



Strategic Planning

NMSBA VETERAN BOARD MEMBER TRAINING

LEANNE GANDY


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Welcome and Introductions

- ▶ District
- ▶ # of years as a board member
- ▶ Brag on your district
- ▶ What is your SuperPower?



What is your level
of familiarity with
strategic planning?



“The trouble with not having a goal is that you spend your life running up and down the field and never score.”

-BILL COPELAND

Set the Course for the Future

- ▶ Identify district needs through multiple lenses
 - ▶ Consider different perspectives
 - ▶ Students
 - ▶ Staff
 - ▶ Parents
 - ▶ Community
- ▶ Unlock possibilities for students

Strategic Planning Process

- ▶ Establish Norms
- ▶ SOAR
- ▶ Community Needs Assessment
- ▶ Mission and Vision
- ▶ Core Values
- ▶ Develop Strategic Priorities
- ▶ Develop District Goals and Action Plans

Strategic + Planning

- ▶ Plans describe short-term goals
 - ▶ Objectives with actionable steps
 - ▶ Report quarterly
- ▶ Strategy is focused on long-term goals
 - ▶ Reflection
 - ▶ Vision
 - ▶ Anticipate and mitigate potential challenges
 - ▶ Forecast 3-5 years
 - ▶ Review annually
- ▶ [LMSD Strategic Reporting Tool](#)

Tenets of Strategic Planning

- ▶ Involve cross-functional teams
 - ▶ All departments contribute to shaping the direction of the organization
- ▶ Align leadership with direction of district
- ▶ Engage employees across all departments and levels
- ▶ Continually communicate your goals
- ▶ Allow as many people as possible to take action toward district goals

Considerations

- ▶ Allow time for big picture thinking together
- ▶ Ask the hard questions
- ▶ Embrace honesty and discomfort
- ▶ Focus energy on key decisions that will positively impact student success
- ▶ Keep it simple
- ▶ Make strategy a habit
- ▶ Have fun

Why Norms?

- ▶ Norms are rules that guide behavior among members of a group to support collaborative work
- ▶ Think of the worst team you have ever been a part of where members are dependent on each other
 - ▶ What made this experience bad?
- ▶ Think of your best team experience
 - ▶ What made this experience good?
- ▶ What behaviors make for a good team experience?

S O A R

- ▶ Strengths
 - ▶ Opportunities
 - ▶ Aspirations
 - ▶ Results
- ▶ A process for appreciative inquiry
 - ▶ Focuses participants on contributory aspects of issues

SOAR Process

- ▶ Assemble cross-functional team representing leadership from all district departments
- ▶ Divide leadership team into smaller groups
- ▶ Brainstorm the district's strengths, opportunities and aspirations
- ▶ Use positive questions to generate images of possibility and potential for the district
- ▶ Small groups reconvene to report out to larger group
 - ▶ Summarize the organization's positive core – the total of unique strengths, resources, capabilities and assets
- ▶ Individuals each rank their five highest priority strategies
- ▶ Determine district's top priorities

Community Needs Assessment

- ▶ Community voice is essential
 - ▶ School district accountability
 - ▶ Develop and strengthen partnerships for student benefit
 - ▶ Build support
 - ▶ Activities and initiatives
 - ▶ Mill levies and bond issues

Community Needs Assessment

- ▶ Strategically invite participants to represent various categories
- ▶ Provide each participant with a name tag that includes a letter and a number
 - ▶ Students
 - ▶ Certified staff
 - ▶ Non-certified staff
 - ▶ Business community
 - ▶ General support individuals
 - ▶ Parents
 - ▶ Elected officials
 - ▶ Administration
 - ▶ Board of Education

Community Needs Assessment, cont.

- ▶ Large group is asked to identify current needs (desired change)
- ▶ Divide group into like peer groups
 - ▶ Group will rank needs identified previously
- ▶ Divide group into stratified groups with representatives from each peer group
 - ▶ Group will prioritize the most highly ranked solutions
- ▶ Reassemble large group and report priorities identified in the session explain how these priorities will be considered in the development of the district's strategic plan

Vision

- ▶ Creates a mental picture of what our organization strives to look like in the future
 - ▶ Clear
 - ▶ Descriptive
 - ▶ Empowering
 - ▶ Understandable
- ▶ What is it we aspire to?

Mission Statement

- ▶ Core purpose of the organization and its contribution to society
 - ▶ Memorable
 - ▶ Inspiring
 - ▶ Short
 - ▶ Simple

Core Values

- ▶ Values guide the behaviors or actions one would expect to observe or feel within the organization
- ▶ Values are special and unique to the organization and shared by all
- ▶ Values are what the organization holds true and should endure or last no matter the challenges faced

Identify District Strategic Priorities

- ▶ Utilize information gathered from the SOAR process and the Community Needs Assessment to identify strategic priorities
- ▶ Develop goals and specific action plans to achieve the district priorities

Planning Considerations

- What will we need to do to accomplish our goals? (strategies)
- How will we measure our progress and determine whether we achieved our goals (key performance indicators)?
- How will we report/track progress?

Develop District Strategic Plan

- ▶ Action plan for each strategic priority
- ▶ Strategies to accomplish each strategic priority
- ▶ Measures of success (Evaluation)
- ▶ Completion date
- ▶ Responsible party
- ▶ Develop monitoring/reporting mechanism

SMART GOALS

- ▶ Clarify your ideas
- ▶ Focus your efforts
- ▶ Use your time and resources productively
- ▶ Increase your chances of achieving what you want for your students

SMART GOALS

- ▶ Specific
 - ▶ Simple, sensible, significant
- ▶ Measurable
 - ▶ Meaningful, motivating
- ▶ Achievable
 - ▶ Agreed, attainable
- ▶ Relevant
 - ▶ Reasonable, realistic and resourced, results-based
- ▶ Time bound
 - ▶ Time-base, time limited, time/cost limited, timely, time-sensitive

School Board Retreat

- ▶ Team building activities with board members and superintendent
- ▶ Establish group norms to guide how the group will work together cohesively
- ▶ Review/revise the district vision and mission
- ▶ Review results of Community Needs Assessment
- ▶ Review leadership SOAR

School Board Retreat, cont.

- ▶ Leadership team joins work session
- ▶ Take Flight with DISC assessment debriefing
- ▶ Strategic plan review
- ▶ Collective commitments

Strategic Plan Adoption

- ▶ School Board reviews and approves revised draft of strategic plan
- ▶ Ongoing monitoring and quarterly reporting of progress
- ▶ Community follow-up to present strategic plan

Implement and Monitor

- ▶ Use your vision, mission statement, and established priorities to say “no” to initiatives that won’t enhance your long-term strategic position
- ▶ Maintain a long-range perspective and make decisions that stay the course for success for years
- ▶ Monthly reporting to school board
 - ▶ [Strategic Reporting Tool](#)
- ▶ Superintendent evaluation based on progress in achieving the priorities outlined in the Strategic Plan

Thank you!

LeAnne Gandy

Director of Leadership Development

Cooperative Educational Services

leanne@ces.org

