



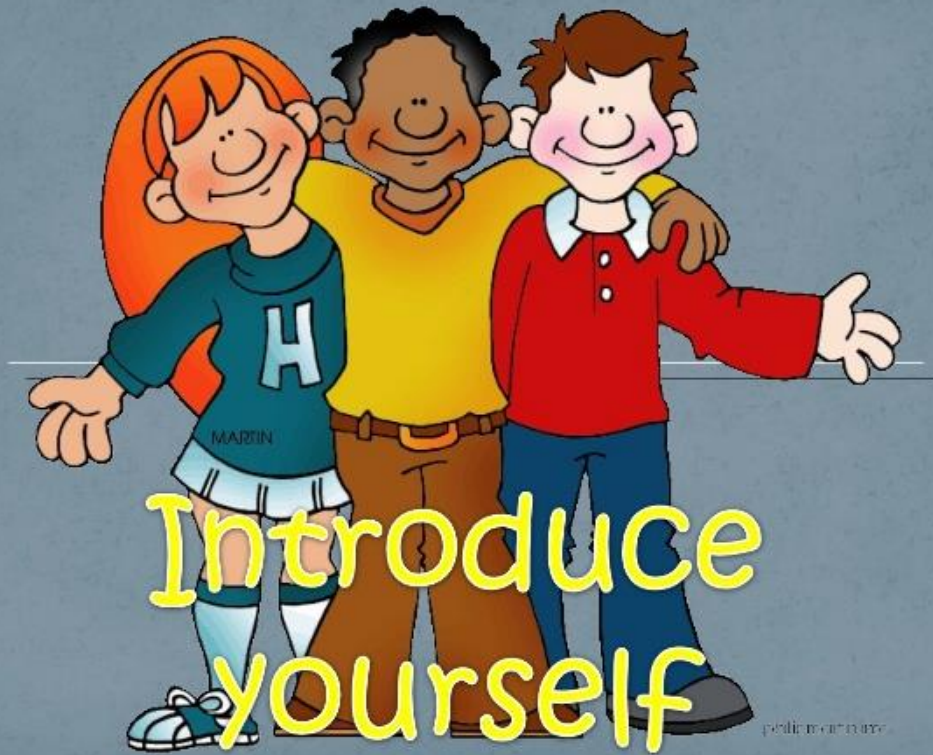
THE IMPORTANCE OF STRATEGIC PLANNING IN EDUCATION

Leadership Session for New School Board Members

JULY 11, 2024

Navigating Success for Student Outcomes

COOPERATIVE EDUCATION SERVICES (CES)



Welcome and Introductions

- District
- Number of months as a School Board Member
- Brag on your district
- What is your “one thing”?

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



A Strategic Plan Does *Three Things:*

1. Communicates where we are going
2. Drives decisions about the use of resources (time, talent, and dollars)
3. Holds the superintendent accountable



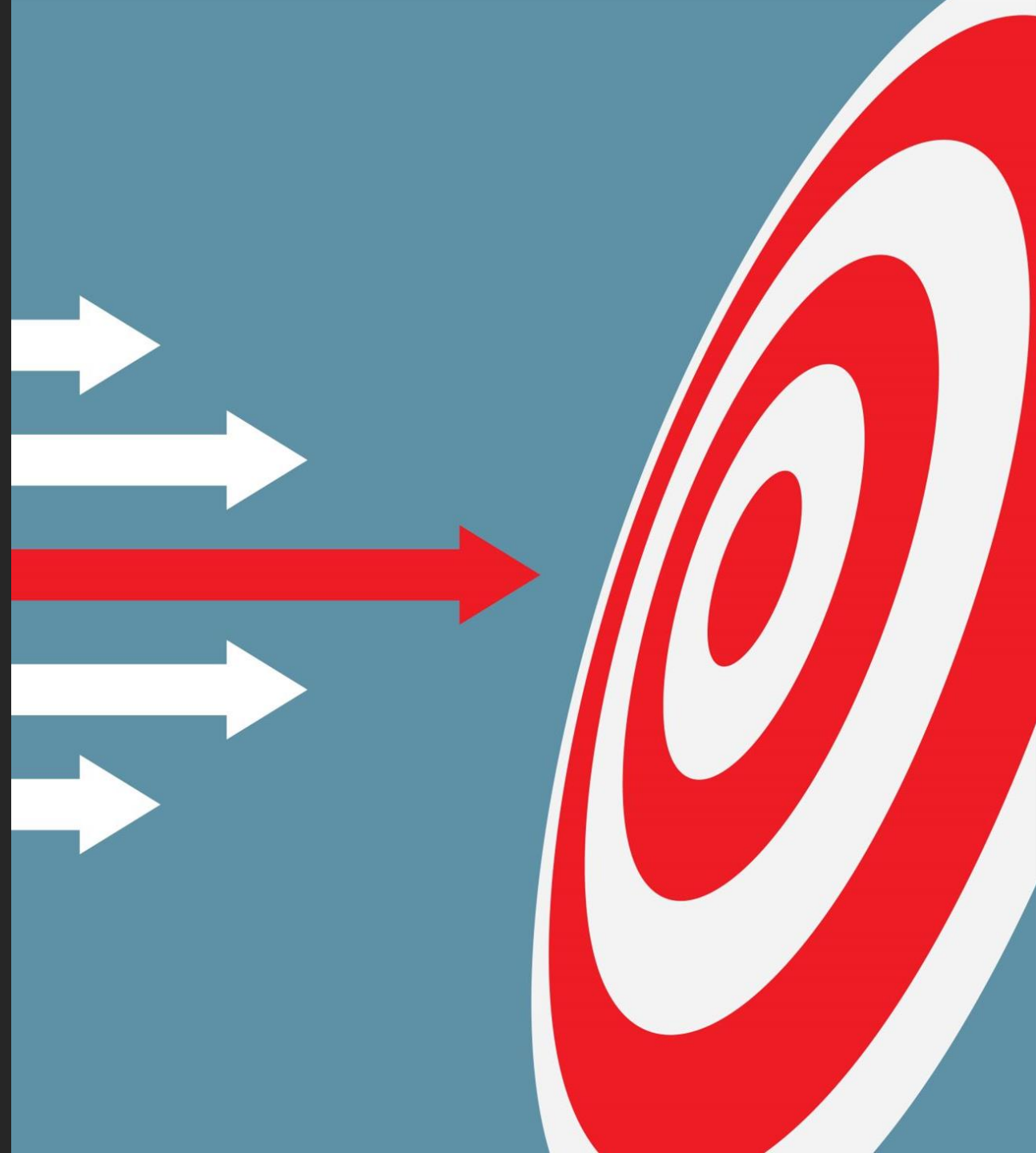
Set a Course for the Future

- Identify district goals through multiple lenses
- Consider different perspectives
 - Students
 - Staff
 - Parents
 - Community and Cultural Leaders
 - Elected Officials
 - Who else?
- Unlock new possibilities for students



Strategic Planning Process

- Initiate and Communicate
- SOAR (Strengths, Opportunities, Aspirations, Results)
- Community Ideas and Needs Assessment
- Mission and Vision
- Core Values
- Determine Strategic Priorities
- Develop District Goals and Action Plans



Short and Long-Term Goals



Plans describe short-term goals

- *Objectives with actionable steps*
- *Report quarterly*

Strategy is focused on long-term goals

- *Vision*
- *Anticipate and mitigate potential challenges*
- *Forecast 3-5 years*
- *Review and update annually*



Use cross-functional teams – all departments contribute to shaping the direction, data, and metrics

Tenets of the Process

- Align leadership and staff with direction of district
- Engage employees across all schools and levels
- Continually communicate your goals
- All staff take action to review data and achieve goals



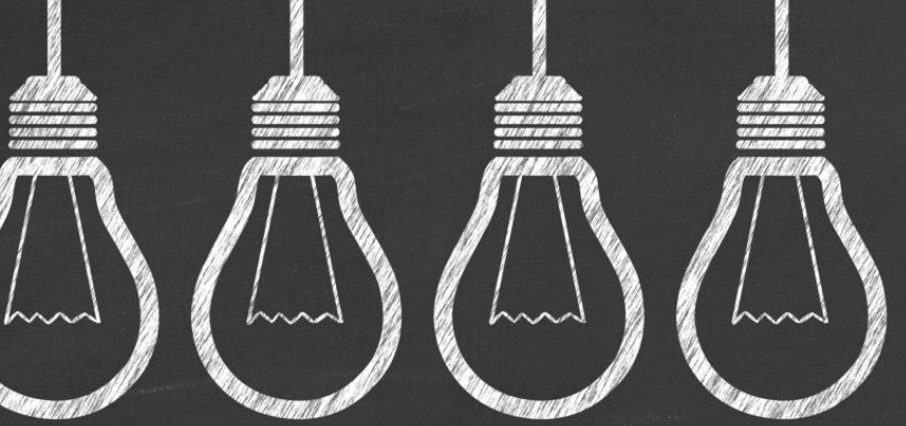
Considerations

- Allow time for big picture thinking
- Ask the hard questions
- Embrace honesty and discomfort
- Focus energy on key decisions that will positively impact student success
- Keep it simple and focused
- Remember that every district is unique



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 high-performing team?



SOAR

Strengths

Opportunities

Aspirations

Results

- Situational assessment
- A process for appreciative inquiry
- Focuses participants on contributory aspects of issues



S O A R 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, continued

- 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, continued

- 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

- A compelling picture of the desired future
- What our school district strives to look like (state of being)

Clear

Inspirational

Memorable

- What is it we aspire to?



Vision Examples

- Empowering learners, transforming lives
- Every student, future-ready
- Inspiring excellence, cultivating potential

1. Every student achieves their highest potential and contributes positively to our community and beyond
2. A community of lifelong learners and leaders who positively impact our community and the world
3. Inspire a passion for learning, innovation, and collaboration in every student
4. Equip students with the knowledge, skills, and character to thrive in a changing world



Mission Statement

How are we going to achieve the vision?

Core purpose of the school district and its contribution to society

Descriptive

Empowering

Understandable




Core Values

- What we believe and hold true
- Guides the behaviors and actions throughout the organization
- Special and unique to our school district and shared by all
- How we will endure and last no matter the challenges

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



A magnifying glass is positioned over a bar chart. The chart shows two groups of bars, labeled 'Q2' and 'Q3'. Each group contains two bars, one blue and one green. The magnifying glass is focused on the 'Q2' group, making the bars and labels appear larger and more detailed. The background is a dark, textured surface.

Planning Considerations

- What we need to accomplish our goals? (strategies)
- How will we measure our progress and determine whether we achieved our goals - Key Performance Indicators (KPIs)?
- How will we report/track progress?



Develop the Strategic Plan

- Action plan for each strategic priority
- Strategies to accomplish each strategic priority
- Measures of success (Evaluation)
- Completion date
- Lead person
- Responsible parties
- Use a monitoring/reporting mechanism

SMART GOALS:

S

Specific

M

Measurable

A

Achievable

R

Relevant

T

Time-based

SMART Goals

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



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

School Board Work Session

- Team building activities with board members and superintendent
- Clarify 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 Work Session

- Review Current Conditions
 - Leadership team joins
 - Data analysis and review
- Listen first
 - Seek student voice
 - 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, Monitor, and Update

- 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
- Regular reporting to school board
Strategic Reporting Tool
- Superintendent evaluation based on progress in achieving the priorities outlined in the Strategic Plan

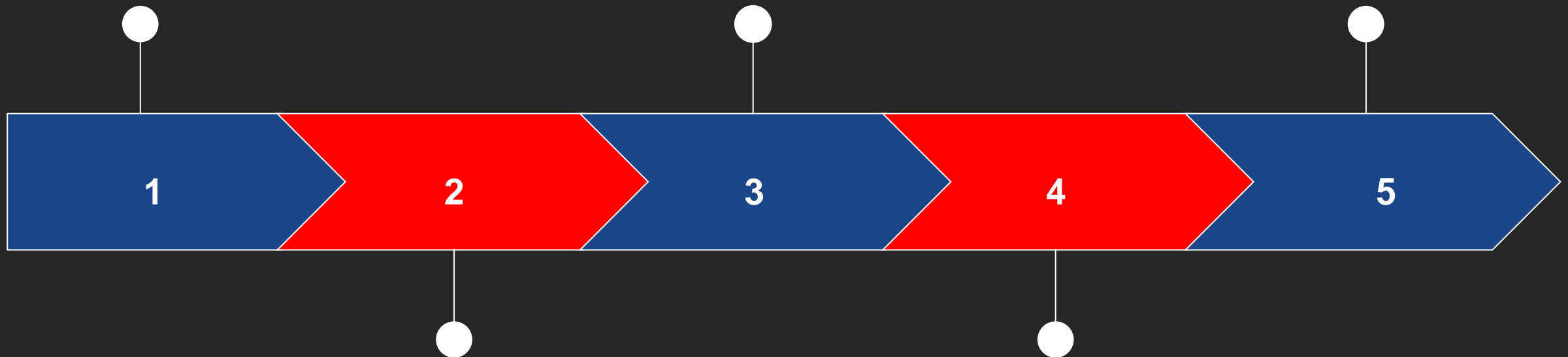


Summary - Strategic Planning

Initiate and Seek
Community Input

Develop Strategies
and Actions

Review Data,
KPIs, and Update



1

2

3

4

5

Define Vision, Mission,
Values, Goals, and Metrics

Implement and
Monitor Progress

Thank you!

Dr. Kurt Steinhaus

COOPERATIVE EDUCATIONAL
SERVICES

ksteinhaus@ces.org

