Strategic Planning - “Hope for the best is not a strategic initiative”

October 26, 2018, Dr. Jeffrey M. Schatz
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Why Plan for the Future?

✓ To set the course for the future
✓ To embrace inevitable change
✓ To stay current and relevant
✓ To set a Proactive vs. Reactive environment

“All to often we have behaved like bystanders, swayed by other's decisions and constantly reacting to situational crisis. By merely reacting to demands for change, anarchy frequently results; we try to be all things to all people, probably satisfying not one of those whom were are attempting to serve. We must relinquish our role as bystanders and become proactive planners…to help create the kind of world we want for tomorrow’s children” (page XIV)

Educational Planning: Strategic, Tactical, and Operational, 1999, by Kaufman, Herman, and Watters
Why Plan for the Future?

“Organizations that want to survive, prosper, and do good and important work must respond to the challenges the world presents. Their response may be to do the same thing they have always done, only better, but they may also need to shift their focus and strategies”.

Strategic Planning for Public and Non-profit organizations, 2018, by John M Bryson (page 6).

“Strategic planning helps organizations achieve two critical outcomes: clear decisions about purpose and strategy and commitment to those decisions. It is a process designed to support leaders in being intentional rather than reactive”.

Strategic Planning for Non-Profit organizations, 2015, Michael Allison & Jude Kaye (page 1)
School District Planning Horizons

- **Planning**: 2019-2020
- **Implementing/Monitoring**: 2020-2024
- **Mission, Vision, Priorities, Outcomes**: 2019-2024
Strategic Planning Objectives

- Committed to developing a strong and viable strategic planning process.
- Seamless process designed to meet the needs of school/organization.
- Moving systems from a reactive to proactive mindset.
- Building the capacity for strategic focus and results.
- Aligning the Programmatic and Operational systems.
- Creating consistency and transparency.
- Creating realistic strategic priorities with results measurements.
- Alignment with Federal, State, & AdvancED accreditation standards.
Macro Outcomes

✓ High-level academic performance – students first

✓ A comprehensive strategic plan driven by a big vision

✓ Vertical Alignment throughout the school district

✓ Re-energize the overall mission and vision of the school district
Strategic vs Operational Planning

Strategic Planning
• Long Term (5-10 years)
• Focus on Future
• Considers Strategic Focus
• Integrates Organizational Systems
• Integrates Resource Allocation

Operational Planning
• Short Term (1 year)
• Annual Focus and Results
• Implements Strategic Focus
• Focus on one Strategic Focus Goals
• Use of Resources already Identified
Reactive vs. Proactive Mindset

Proactive Model

- Wasted time
- Wasted talent
- Wasted resources
- Lost opportunities
- Perpetual stress

Reactive Model
Levels of Strategic Planning

- MEGA (Societal)
- MACRO (Community)
- MICRO (Individuals)
Change Model — Building a Capacity for Change

- Present State
- Why Change?
- Desired Future
- Transition

Managing During Transition
Resource Allocation and Investments

- **Federal**
- **State**
- **Local**
- **Other**

**Standard of Effort Report**

**ROI – “Rate of Return on Investment”**
Strategic Planning Rubric for Making Decisions

Strategic Plan

Programmatic Alignment

Resources

Human Resources + $$

Sustainability

Short and Long Term
Strategic Plan Template

“Transformational Change?”

“Hope for the best is not strategic initiative”!

AdvancED/Cognia Standards
- Leadership Capacity
- Learning Capacity
- Resource Capacity

“Transformational Change?”

“What we do is what we value”

Mission Statement

Annual Renewal

Vision Statement

Values/Beliefs

Organizational Focus

Continuous Improvement

Measurements/Results

Strategic Priorities

Our Cause
Our Actions
Our Impact

Proactive vs. Reactive
Emerging and Future Trends

- SEL, Mental Health, Behaviors
- Federal & State Politics and Bureaucracy
- Data Driven Instruction
- Digital Resources Integration Into Practices
- Personalized Learning
- Workforce

Public Schools
Preparing for Strategic Planning

Data Collection → Surveys
Focus Groups
SWOT Analysis

Data Analysis → Strategic
Project Plan

Strategic Planning Committee
Create a Steering Committee

Representation from Community and Schools

- 12-20 people
- Board Members
- Administrators
- Staff (Teachers & Support Staff)
- Students
- Community members
- Others?
What is your Current Plan?

- Review Mission and Vision Statements
- Alignment to Cognia/AdvancED Continuous Improvement System
- Alignment to Federal & State Mandates
- Strategic Focus and Results
A New Beginning

The kind of purpose that you will need to launch a new beginning must come from within the organization – from its will, abilities, resources, and CHARACTER. The interactions of these qualities is the process that will redefine your purpose.
Contact Information

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