



CATALYST FOR EDUCATIONAL CHANGE

STRATEGIC PLANNING

ORIENTATION



ORIENTATION PURPOSE

The Orientation session is to answer the question, “Who are we, and what are we being asked to do?” The Orientation session paints the “Big Picture” of the strategic planning process so that all strategic planning team members have a shared understanding of the process and their roles and responsibilities in helping the district set a clear direction for the future.

At the Orientation, team members will meet one another and learn the stakeholder group that each member of the team represents. Stakeholder groups include community members, families, students, certified staff, non-certified staff, management, board, and union.

The Orientation session will include opportunities to learn about the current plan and the status of plan execution and results.

COMMON VOCABULARY

Change management: A structured approach to transitioning individuals, teams, and organizations from a current state to a desired future state.

Organizational alignment: The existence of a consistently clear understanding of the district’s mission, vision, and strategy throughout the entire organization. An aligned organization is one where everyone understands how what they do contributes to the aspirations of the organization, and it is clear how departments, teams, and employees interact to create value for the organization’s customers and connect to the organization’s vision.

Perspective: A view of an organization's strategic performance viewed through a particular lens. Typical perspectives include financial stewardship, customer service, internal processes, and organizational capacity for learning and growth.

Strategic goal: The specific continuous improvement activities balanced across the perspectives that down strategy into components and make strategy actionable. The long-range goals that, if accomplished, will allow the district to fulfill its mission and vision. Goals must be specific, measurable, actionable, results-oriented, and timely (SMART)

Strategy: The choices made and the actions taken, from many choices and actions that are potentially available to move the organization from its current state to some desired future state. A “game plan” to



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address the top priorities that, if accomplished, will position the district better to achieve its mission, vision, and goals.

Strategic Plan: The document used to communicate the organization’s mission, vision, core values, goals, and strategies throughout an organization and to its stakeholders. The document sets the “Big Picture” direction, focus, and helps the district align its resources of people, time, and money to that direction.

Strategic planning: An organizational management activity that is used to set priorities, focus energy and resources, strengthen operations, ensure that employees and other stakeholders are working toward common goals, establish agreement around intended outcomes/results, and assess and adjust the organization’s direction in response to a changing environment. Effective strategic planning articulates not only where an organization is going and the actions needed to make progress but also how it will know if it is successful. The result of the planning process is a strategic plan.



ORGANIZATIONAL CHANGE

An organization has two choices: Be intentional about the path the organization follows or turn on the organization's autopilot. If you are running your organization without a plan, you are just using the navigation system and not paying attention to how you are moving your organization to a higher level of performance. Strategic planning is not about taking on additional work; it is about taking all those numerous daily decisions and initiatives and making them part of an integrated focus system. Strategic Planning is a continuous improvement process based on key questions:

1. **Where are we now?** (How would you describe what is working and what needs attention? What are the strengths, weaknesses, opportunities, and threats as described by data, information, and perceptions?)
 - Mission statement
 - Data Review
 - SWOT (data analysis to identify strengths, weaknesses, opportunities, and threats)
2. **Where do we want to be?** (What are your best hopes for the future? What do you want to be different 5-10 years from now compared to what it is currently? What is the preferred future?)
 - Vision Statement
 - Values statement/commitments
 - Sustainable competitive advantage
3. **How will you get from where you are to where you want to be?** (What will everyone do differently to get improved results? What research-based strategies will you implement with fidelity? How will what you do drive your professional development planning and implementation?)
 - Long-range Goals
 - Critical Strategies
4. **What are you learning?** (How will you be certain that your implementation of the research-based strategies is adding value and improving your results? How will you monitor and report your progress?)
 - Action plans
 - Progress monitoring
 - Short-term goals, priorities, and initiatives
 - Execution

Strategic Plans:

- Are based on the pillars of mission, vision, values/commitments, and goals.
- Reflect the values of the organization and define commitments and non-negotiables.
- Set focus and priorities and Connect initiatives to needs and requirements.
- Define the criteria for measuring success
- Define what we ALL need to do well together.
- Inspires action to achieve a big future
- Guides everyone in daily decision-making



Activity 1: Our Planning Team

1. Learn who is on the team and what the charge is for the team.
2. Review the team roster, meeting schedule, and roles and responsibilities of the planning team. Ensure commitment of plan team members.

The responsibilities of the planning team members include:

- Attend all meetings of the planning team.
- Prepare for each meeting by reading materials aligned to each agenda.
- Conduct data analysis of the district at a Data Retreat by reviewing key data indicators and measures to determine the district's strengths and opportunities for improvement.
- Develop a shared understanding of the needs of stakeholder groups through a review of an environmental scan or stakeholder satisfaction data at a Data Retreat.
- Explore educational, demographic, political, economic, social, and technological impacts on the district's future at a Vision Retreat.
- Explore research-based, effective practices of high-performing districts at a Vision Retreat.
- Review and revise the district's shared mission, vision, values/commitments, and goals at a Vision Retreat.
- Provide suggestions for indicators and measures that align with monitoring and reporting district success at a Setting Direction Retreat.
- Identify key strategy gaps that are aligned with the data-based opportunities for improvement through a review of the environmental scan and/or system assessment (internal audit)
- Present a draft of the plan for stakeholder review and input.
- Revise and finalize the plan draft based on stakeholder review and input.
- Recommend the strategic plan to the superintendent.
- Learn about the responsibilities of living the plan.



Review The Strategic Planning Process

Take notes to help you understand the Big Picture of strategic planning:





**REVIEW THE STATUS OF
THE CURRENT STRATEGIC PLAN**

What is the status of the current plan? Has the plan been a useful document to guide the district's action over time?



Examine A District Strategic Plan Based On The Strategic Planning Process

One Page:

- Mission and Vision
- Core Values
- Long-range Goals
- High-Leverage Strategies

Supporting Documents:

- Vision Continuum
- Key Performance Indicators
- Strategy Action Plan Templates
- Commitments Aligned to Core Values
- Strategic Management System
- Living the Plan

Document any thoughts you have for your plan.