



Why is Strategic Planning Important?

Setting the district's strategy for success is important. To set the course for a successful strategy takes time, dedication, and a clear vision for the district. All stakeholders must be willing to stay the course once the strategy is clearly defined and put into operation.

Here is a look at what strategic planning is and how it can benefit your organization.

What is Strategic Planning?

Strategic planning is the ongoing organizational process of using available knowledge to document a district's intended direction. This process is used to prioritize efforts, effectively allocate resources, align shareholders and employees on the organization's goals, and ensure those goals are backed by data and sound reasoning.

It is important to note that strategic planning is an ongoing process, not a one-time meeting. A strategic plan, when properly developed and executed, allows an organization to respond to situations successfully and to assist the organization to adjust course and correct direction. Often, the strategy that leads to success emerges through a process that's continually at work. Strategic planning requires time, effort, and continual reassessment. Given the proper attention, it can set your school district on the right track.

Benefits of Strategic Planning

1. It creates one, forward-focused vision

One significant benefit of strategic planning is that it creates a single, forward-focused vision that can align your school district and its shareholders. By making everyone aware of your school district's goals, how and why those goals were chosen, and what they can do to help reach them, you can create an increased sense of responsibility throughout your school district.

This can also have trickle-down effects. For instance, if an administrator isn't clear on your organization's strategy or the reasoning used to craft it, they could make decisions on a team level that counteract the district's efforts. With one vision to unite around, everyone at your organization can act with a broader strategy in mind.

2. Draw Attention to Biases and Flaws in Reasoning

The decisions we make come with inherent bias. Taking part in the strategic planning process forces you to examine and explain why you're making each decision and back it up with data, projections, or case studies, thus combatting your mental biases. We tend to make decisions and act based on limited acquisition and/or processing of information or self-interest, overconfidence and or attachment to past experience.

We need to be aware of mental biases that are sure to arise while decisions are being made and have a process in place that filters out those biases. By doing so, the best decision for the school district are made based on the best available information.

3. Track progress based on strategic goals

Having a strategic plan can enable you to track progress toward goals. When each department and team understand your district's larger strategy, their progress can directly impact its success, creating the organizations approach to tracking key performance indicators (KPI's).

By planning your district's strategy and defining its goals, key performance indicators can be determined at the organizational level. These goals can then be extended to department units, school sites and individuals. This ensures that every level of your organization is aligned and can positively impact the district's key performance indicators.

A quality strategic plan needs to be far-reaching and structured; it must remain agile to allow the strategy to evolve and address the challenges and opportunities it encounters. The organization must be prepared to adjust their key performance indicators as goals shift and changes occur within your organization.

Strategic planning value

Here are some possible values that a planning process can add, i.e., new conditions that are achieved that weren't previously achievable:

- Align the school board and management
- Align the management team on a strategic agenda to move the organization forward
- Communicate clarity of direction throughout the organization
- Provide clear direction and thereby restore integrity of leadership
- Solve key performance problems

- Develop a path forward that will attract outside funding
- Improve execution on a change agenda
- Create agreement on core beliefs and principles
- Develop a tool to manage and create the organization's future

When strategic planning is positioned as a learning process, formal strategic planning can help leadership make solidly grounded strategic decisions that will benefit the school district and the children it serves.

Strategic Planning Process Steps:

The strategic planning process is the method that organizations use to develop plans to achieve overall, long-term goals.

The strategic planning process is broad—it helps you create a roadmap for which strategic objectives you should put effort into achieving and which initiatives would be less helpful to the business.

Before you begin the strategic planning process, it is important to review some steps to set you and your organization up for success.

1. Determine your strategic position

This preparation phase sets the foundation for all work going forward. You need to know where you are to determine where you need to go and how you will get there.

Involve the right stakeholders from the start, considering both internal and external sources. Identify key strategic issues by talking with executives at your company, pulling in customer insights, and collecting industry and market data. This will give you a clear picture of your position in the market and customer insight.

It can also be helpful to review—or create if you don't have them already—your company's mission and vision statements to give yourself and your team a clear image of what success looks like for your business. In addition, review your company's core values to remind yourself about how your company plans to achieve these objectives.

To get started, use industry and market data, including trends, insights and current/future demands, to identify the issues that need to be addressed. Document your organization's internal strengths and aspirations, along with external opportunities (ways your organization

can grow to fill needs that the market does not currently fill) and results (your key performance indicators).

As a framework for your initial analysis, use a SOAR diagram. With input from executives, customers, and internal and external market data, you can quickly categorize your findings as Strengths, Opportunities, Aspirations and Results (SOAR) to clarify your current position

As you synthesize this information, your unique strategic position in the market will become clear, and you can start solidifying a few key strategic objectives. Often, these objectives are set with a three- to five-year horizon in mind.

2. Prioritize your objectives

Once you have identified your current position relative to other districts, it is time to determine objectives that will help you achieve your goals. Your objectives should align with your company mission and vision.

Prioritize your objectives by asking important questions such as:

- Which of these initiatives will have the greatest impact on achieving our district's mission/vision and improving our position in the state, region, nation?
- What types of impact are most important (e.g., student achievement, culture/climate)?
- Which initiatives are most urgent?
- What will we need to do to accomplish our goals?
- How will we measure our progress and determine whether we achieved our goals (key performance indicators)?

Objectives should be distinct and measurable to help you reach your long-term strategic goals and initiatives outlined in step one. Potential objectives can be updating academics, recruiting qualified/certified staff, and facilities to name a few.

3. Develop a plan

Now it's time to create a strategic plan to reach your goals successfully. This step requires determining the strategies necessary to attain your objectives and designating a timeline and clearly communicating responsibilities.

Strategic choices usually involve a trade-off in opportunity cost. For example, your company may decide not to put as much funding behind technology upgrades, so that it can put more funding into teacher salaries.

Be prepared to use your values, mission statement, and established priorities to say “no” to initiatives that won’t enhance your long-term strategic position.

4. Execute and manage the plan

Once you have the plan, you’re ready to implement it. First, communicate the plan to the community and district staff by sharing relevant documentation. Then, the actual work begins.

Turn your broader strategy into a concrete plan by mapping your processes. Use key performance indicator (KPI) dashboards to communicate team responsibilities clearly. This granular approach illustrates the completion process and ownership for each step of the way.

Set up regular reviews with individual contributors and their managers and determine check-in points to ensure you’re on track. Provide quarterly updates to the Board of Education and semi-annual reports to the community.

5. Review and revise the plan

The final stage of the plan—to review and revise—gives you an opportunity to reevaluate your priorities and course-correct based on past successes or failures.

On a quarterly basis, determine which KPIs your team has met and how you can continue to meet them, adapting your plan as necessary. On an annual basis, it’s important to reevaluate your priorities and strategic position to ensure that you stay on track for success in the long run.

Track your progress using balanced scorecards to comprehensively understand of your business's performance and execute strategic goals.

Over time you may find that your mission and vision need to change — an annual evaluation is a good time to consider those changes, prepare a new plan, and implement again.

Master the strategic planning process steps

As you continue to implement the strategic planning process, repeating each step regularly, you will start to make measurable progress toward achieving your company’s vision.

Instead of constantly putting out fires, reacting to the competition, or focusing on the latest hot-button initiative, you’ll be able to maintain a long-term perspective and make decisions that will keep you on the path to success for years to come.