

Balanced Leadership Institute

Strategic Planning

What does thinking strategically mean? How can an institution stimulate the strategic long term thinking while we are trying to solve today's problems?

The fact is most institutions are stuck in a cycle of being reactive and having to "put out fires" to solve immediate issues. Whether it is managing or acquiring resources (funding facilities, workforce), dealing with regulation, responding to parents, or recruiting the right person to do a certain job. Our school principals and in most cases Board members are constantly reacting to events and situations that require their attention daily. This makes it very difficult to think strategically while one has so much to deal with right now. This is why it is essential for a group to specialize and focus on strategic planning while another group manage the daily operations of a school. Traditionally the Board of Trustees or Board Directors has the ownership of the strategic plan, while the administration is responsible for the daily operation of the school.

Even though the workload is divided among school Administration and Board, the two must work together to ensure that daily operations are connected to strategic goals, and that the strategy is driving decision making and priorities at all levels.

The Board owning the Strategic Plan does not mean they develop it in a vacuum. All stakeholders must be involved in the process at some point. The teachers, the administration and office staff, the parents, and the students should all provide input to the analysis and development of the plan. Surveys, focus groups, and general town hall meetings can be useful tools to incorporate comments and brainstorm together as a community. Data should be collected about the community strengths and resources, needs, challenges, and opportunities. All layers of the organization should have a way to express their ideas in the process of establishing strategic goals. Then the Board has the responsibility to sort all the data and feedback and assemble specific strategic goals. It does not have to be a huge list of goals; 2 or 3 big goals are plenty. Once the community agrees on strategic goals, specific strategies can be developed that become the foundation for annual plans. Working in full partnership with the Administration, the Board can develop annual objectives which constitute the annual operational plan for the school. Many institutions may have a strategic plan but they fail to connect it annual operational plans. This step of turning strategies into annual objectives is critical and must be repeated every year to maintain connectivity to the strategy.

Strategic Planning is an important process for every institution to avoid being reactive and avoid operating based on short term priorities. Achieving big goals and charting the direction takes deliberate planning. At the same time plans should be nimble enough and the Board has the responsibility to recognize a changing environment and take steps to adjust the plans when deemed necessary.