



Successful Strategic Planning



with Dane Peters (danelp88@gmail.com)
Wednesday, April 27, 2016 @ 1:00 p.m.



Overview of Session

- What is a strategic plan?
- How to be strategic
- Steps in strategic planning
- Incorporating the plan into the annual work cycle
- Final Q & A and Resources





Strategic Planning

"Definition: A systematic process of envisioning a desired future, and translating this vision into broadly defined goals or objectives and a sequence of steps to achieve them."

From - Business Dictionary



What makes a plan strategic?

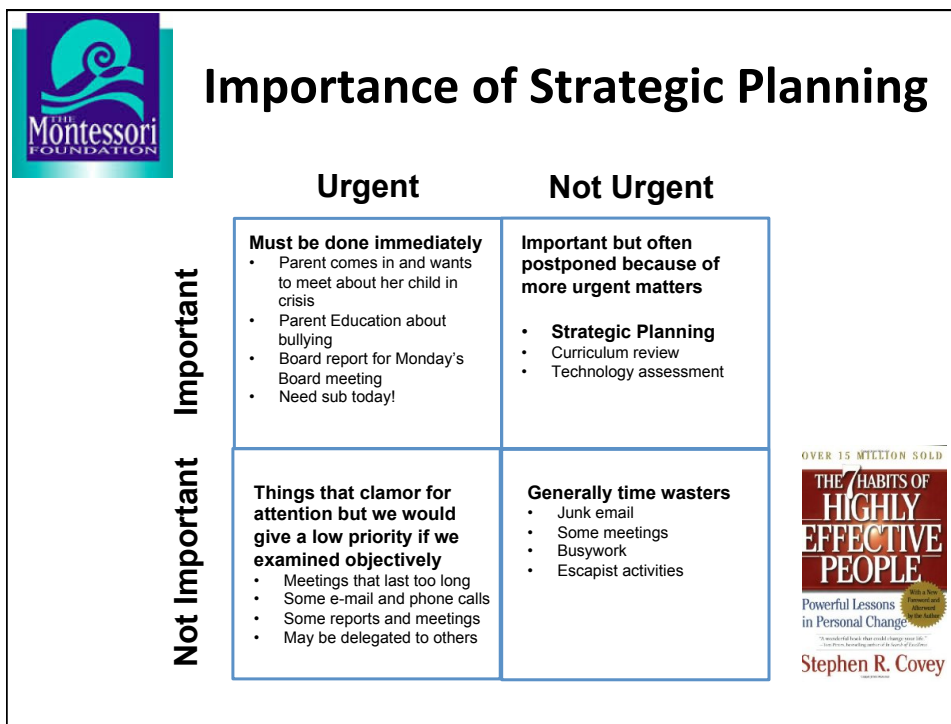
- It is not a wish list
- Planning gets you a plan, not a strategy



Importance of Strategic Planning

Why is strategic planning important?








Benefits of Strategic Planning

• Accreditation •










Benefits of Strategic Planning



NYS AIS Criteria for Accreditation

- 2.1 The governance of the school is clearly defined, transparent, and understood by all constituents.
- 2.2 The governing body provides for the continuity of mission.
- 2.3 The governing body provides stability in transitions of leadership for itself and its head of school.
- 2.4 The governing body provides strategic planning for the school.



AMERICAN MONTESSORI SOCIETY

SCHOOL ACCREDITATION STANDARDS AND CRITERIA

STANDARD 2: GOVERNANCE, LEADERSHIP, AND CONTINUOUS IMPROVEMENT—Strategic Plan

The quality Montessori school promotes student learning and school effectiveness through strong governance and leadership and establishes, implements, monitors, and refines a strategic planning process to demonstrate continuous improvement.

- 2.13 Engages and supports stakeholders in the process of continuous improvement.
- 2.14 Ensures that plans for continuous improvement are aligned with the mission and vision of the school and the expectations for student learning.
- 2.15 Annually monitors, updates, and communicates the progress and results of improvement efforts to stakeholders.
- 2.16 Annually evaluates and documents the effectiveness and impact of its continuous improvement process as outlined in the Strategic Plan.



Pitfalls of Strategic Planning

What would the argument be against strategic planning?

- Planning is a journey, not a destination; an outline, not a blueprint
- Stay out of the comfort zone - planning is comfortable, strategy is often uncomfortable because it deals with variables.
- Formal planning is one source for the leader, but often not the most important.
- The leader must synthesize strategy from a variety of sources, including some of the 'softest' forms of information.

"In the Big Lie of Strategic Planning," Roger Martin, *Harvard Business Review*, January-February 2014
 "The Case Against Strategic Planning" - Robert Evans 2007 *Independent School* magazine



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Being Strategic

Type 1
Faculty
Fiduciary
& Staff

Type 2
Parents
Strategic

Type 3
Trustees
Generative





Being Strategic

Stability Markers

#1 Cash Reserve/Debt/Endowment mix

#2 Strategic Plan/Strategic Financial Plan

#3 Executive Leadership

#4 Hard Income Driven

#5 Profiled Board


#6 Board Leadership



Being Strategic

Decisions Carver Style

Policies	Time and Attention Graph
STRATEGIES Mission Survival Leadership	BOARD'S DECISIONS
PARTNERSHIP Authorizations Finance Policies Enrollment Employment terms	BOARD & HEAD: SHARED DECISIONS
OPERATIONAL Admissions Staffing Program Systems	HEAD'S DECISIONS



Being Strategic

Policies	Time and Attention Graph
STRATEGIES Mission Survival Leadership	BOARD'S DECISIONS <div style="text-align: right;">Head's Advice</div>
PARTNERSHIP Authorizations Finance Policies Enrollment Employment terms	BOARD & HEAD: SHARED DECISIONS
OPERATIONAL Admissions Staffing Program Systems	<div style="text-align: left;">Board's Advice</div> <div style="text-align: right;">HEAD'S DECISIONS</div>

• ~~Chapter 5: Building the Montessori Program~~



Being Strategic

The Importance of Leadership

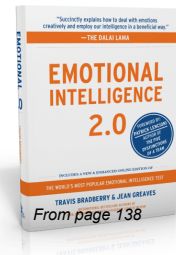


Being Strategic

Using EI in Strategic Planning

Be in tune with each person in the room. “Social awareness strategies.” Here are a few of 17 listed.

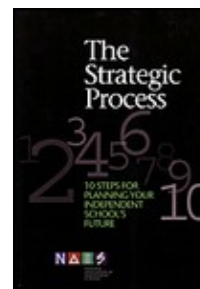
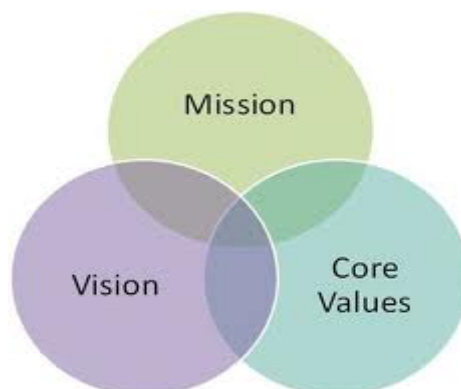
- Greet People by Name
- Make Timing everything
- Watch Body Language
- Practice the Art of Listening
- Step into their Shoes
- Catch the Mood of the Room



Preparing the environment so ALL can speak . . .



Being Strategic





Being Strategic

Review the Mission

A Mission Statement should be . . .

- reviewed on a regular basis and must be done as part of a larger community action.
- one-sentence, clear, concise statement that says who the organization is (the name, that it is a nonprofit, and what type of agency it is), what it does, for whom and where.
- no more than 30 words & memorable

ISM consultant



MISSION
Spread ideas

"AMS Mission, Vision, and Core Values," D. Peters, *Montessori Life*, Winter 2014-15
<https://drive.google.com/file/d/0B803lcEaOeyfTjllN3Njd01ueWc/view?usp=sharing>



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Steps in Strategic Planning

- 1. Appoint an ad-hoc Strategic Planning Committee**
2. Hire or appoint a facilitator.
3. Review the previous strategic plan
 - a. were the goals achieved?
 - b. what goals should be carried over if any?
4. Plan two - three community workshops (aka Town Hall meetings)
 - a. Strengths-Weaknesses-Threats-Opportunities
 - b. Visioning
5. Strategic Planning committee completes the plan
6. Final Board approval
7. Present to the Community
8. Implementing the Plan



Strategic Planning Committee





- 1. ad hoc Committee of the board**
- 2. Committee should be relatively small — under 10 members**
- 3. Can work well together**
- 4. Make recommendation to board**







Strategic Planning Committee

silent generation	baby boomers	generation x	millennials
			
1925-42 (73-90)	1943-60 (55-72)	1961-81 (34-54)	1982-2004 (11-33)

From Jamie Notter presentation for AMS Summer Symposium – July 14, 2015



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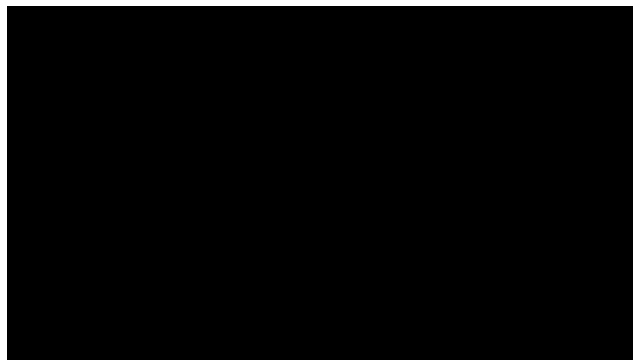


Who Should Facilitate?

- Hire or appoint a facilitator - it is important to have an impartial facilitator who can guide the committee and community meetings without influence. Don't do it yourself! You need to be available to give your important opinion too.
- In between meetings, the facilitator will type up and collate information.
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Staying Positive





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Strengths, Weaknesses, Opportunities and Threats (SWOT)

- Brainstorm your Strengths. What makes your school great?
- List Weaknesses. What areas could be improved? These will be turned into goals later.
- What Opportunities are there for your school?
Examples: area Montessori schools that might be feeders for your elementary program.
- What are area Threats? (short term and long term) Examples:
Local business closing, new Montessori program in the area.



Visioning

Using all of the information from the previous sessions, the large group breaks into smaller groups.

- In small groups discuss what the school will look like within 5 years and in the future.

This is where having a generative environment is critical.

- Small groups present to the larger group.



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Set up Implementation Plan

- **Probably THE most important step •**

Goals & Action Items	Who's Responsible	Resources Need	Start Date	Completion Date
Major Goal I				
Action Item #1				
Action Item #2				

- **Write 5-year Financial Plan**



Set up Implementation Plan

• As an example •

Major Goal 3: The School will give high priority and a long-term commitment to increasing faculty compensation

Action Steps	Responsibility	Initiation Date	Report Date	Completion Date	Resources Needed	Update/Notes
3-1) Increase faculty compensation to levels more competitive with comparable independent schools, considering total compensation packages and giving special consideration to salary levels for the most senior teachers	Fin. Com. w/ Head and Bus. Mgr.	In Process	Semi-ann.	June '09	Budget\$	BK31
3-2) Establish ambitious, long-term goals for faculty compensation based on, among other things, a model for a mission-consistent, sustainable organizational and cost structure	Fin. Com. w/ Head and Bus. Mgr.	In Process	Semi-ann.	June '09	Budget\$	BK32

Major Goal 5: The School will further strengthen the quality and Montessori-consistency of its programs and curriculum, with the goal of preparing its students for life and work in the 21st century.


Action Steps	Responsibility	Initiation Date	Report Date	Completion Date	Resources Needed	Update/Notes
5-1) Continue the process of examining the quality of the School's curriculum, to ensure the highest level of excellence and Montessori consistency.	Prog. Dirs. w/ Teachers and Head	In Process	Semi-ann.	Ongoing	Budget\$ for Mont. materials	




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Annual Work Cycle



- 1) Establish Annual Board Calendar
- 2) Overview of work to be accomplished
- 3) Committee Membership & Charges
- 4) Head's Goals & Objectives
- 5) Board Work Plan



Annual Work Cycle





Annual Board Agenda

Mission

Strategic Plan

Head's G & O

Evaluations

40



Annual Work Cycle



To make the cycle work most efficiently . . .

- Post agenda ahead of time
- Make committee work paramount
- Post related docs ahead of time
- No smartphone noises
- Be civil at Board meetings
- Build an Environment of Trust

"Huddle, Scrum, or Teamwork" – D. Peters *Montessori Leadership*, June 2010
<https://drive.google.com/file/d/0B803lcEaOeyfQndRenoyakJOVDQ/view?usp=sharing>



Annual Work Cycle





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Resources

"Successful Strategic Planning: One School's Approach" by Susan Kambrich, NAIS *Independent School* Blog, August 2015

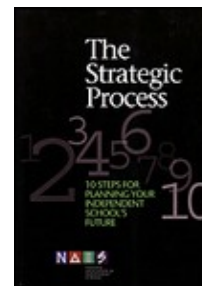
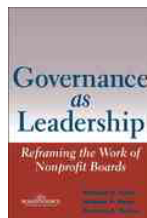
<http://www.nais.org/Independent-Ideas/Lists/Posts/Post.aspx?List=a5fa8a61-7db4-4408-9e71-152670940bc3&ID=462&Web=8544a572-104a-4d86-bf80-058334725dde>

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Generational Differences

GenX daughter to Babyboomer father: Do you like the new iPad I got you for your birthday?

Father's reply: Yes, it is nice.





“Is - Is not” Exercise

Brainstorm what your school is and what it is not. This gets your group talking about who you are and what you are. This is a way to have everyone feeling very positive about the school. Demographics, enrollment, and budget data should be available.

Our school IS:

- parents dedicated to quality education
- committed to Montessori through 8th grade.

Our school IS NOT:

- large enough to accommodate all of its students
- just another private school

