

Making Strategic Changes

Starting with a board work session, here are the steps you can use to make long-term planning relevant to your district, your staff, and your community

Picture this: Your school board, superintendent, senior administrators, faculty representatives, and perhaps a couple of community leaders spend a day together reviewing “strategic change initiatives” that have been fashioned by four task forces.

This work session, which is hosted by your board’s planning and development committee, is the culmination of a six-month process overseen since the beginning by the committee’s members. The strategic change initiatives are essentially projects consisting of detailed objectives, an action plan, and a recommended budget to address four high-stakes issues that were selected early in the planning process for attention during this academic year.

The issues are:

- Long-deferred building maintenance that is likely to cause health and safety issues if not dealt with as soon as possible.

- Virtually non-existent involvement in the district from the business sector and a perceived lack of support from the business community.

- An actual and projected decline in student population that could lead to school closings, and certainly will have a negative impact on state funding.

- A growing number of non-English speaking students in two elementary schools.

Two task forces—the ones dealing with building maintenance and business sector involvement—have been chaired by influential community leaders with grown kids. Participants

include other community leaders: the head of physical plant operations for the community college district, the chamber of commerce CEO, and two prominent business owners, among others.

The other task forces are headed by a highly respected senior administrator and a faculty department head, respectively, and are totally internal, involving administrators, faculty, and a number of parents.

After this intensive strategy review session, the change initiatives are refined and reworked by the superintendent and the senior administrative team. They are reviewed and approved by the board’s planning and development committee, and adopted by the school board for inclusion in the district’s “Strategic Change Portfolio.”

Implementation is meticulously managed separate from the district’s day-to-day operations, which are guided by the annual operating plan and budget. Of course, once these strategic change initiatives have been implemented, they move over from the “newstream” to the “mainstream,” as Rosabeth Moss-Kanter of Harvard Business School describes these two parallel, but separate, courses of action.

Decline in traditional planning

This might not sound like long-range or strategic planning, as many readers have come to know it, but in recent years the strategic change portfolio model has begun to replace the traditional model in both the business and public/nonprofit sectors.

The hypothetical picture I painted is far from fictional; it draws on lots of



real-life experience. I've facilitated several work sessions at which task forces have presented their recommended initiatives, and I've seen these initiatives nurtured and protected in the strategic change portfolio until they have been implemented.

Traditional, comprehensive, long-range (or strategic) planning for arbitrary, meaningless periods such as three to five years has been in rapid decline in recent years for a very simple reason: It has proved to be a largely ineffective tool for generating innovative initiatives to deal with high-stakes issues in a rapidly changing, challenging world.

It's been such a weak innovation vehicle because it basically takes an organization's current programs and services—in their current organizational compartments—and projects them into the future. No one knows what the future will hold in five years, which means such projections—with few exceptions—become mechanistic and essentially useless. The level of detail also drives out the issues that do not fit within established programmatic and administrative boundaries.

Merely reading the kind of bloated tomes that such a process generates is a masochistic exercise, with futility adding insult to injury. No wonder these plans sit on shelves, consulted infrequently if at all, and usually are trotted out only to demonstrate to external audiences (such as the state education department) that the organization cares enough to do serious planning—pounds and pounds of it!

What is your involvement?

Work on a strategic change portfolio process typically begins with a board/superintendent/senior administrator retreat that kicks off two concurrent planning streams: the above-the-line portfolio process and the normal operational planning/budget preparation process. Both of these processes continue on parallel planning tracks

after the retreat.

The kick off retreat provides your board with its single most important opportunity to exert creative, proactive influence, primarily because it actively engages members. An updated vision statement can serve as a framework for identifying strategic issues facing your district. Strategic issues come in the form of opportunities to realize vision elements and challenge that which you see that blocks progress toward your vision.

For a vision statement to serve as a useful planning tool, it must be much more than a two- or three-sentence statement intended to inspire and motivate “the troops” and the wider public. A serious vision statement consists of several elements that paint a picture that you want to create over the long run, and provides you with a series of outcomes that your district's efforts will produce.

The retreat also gives you a chance to review and assess the internal and external conditions and trends that are pertinent to your district's mission, especially federal and state funding patterns and local demographic and economic developments. You also can discuss possible initiatives to address these conditions and trends.

After the retreat, your district's normal operational planning and budget preparation process moves forward. Meanwhile, along a completely separate but parallel track, the process of updating your district's strategic change portfolio begins.

The first major follow-up step, applying to both planning tracks, is to analyze the issues identified in the kick-off retreat. Determine those that should be channeled to the operational planning/budget preparation process (because you believe they can be handled quite well there) and which ones merit going through the strategic change portfolio process.

Many boards rely on the superintendent and senior administrators to ana-

lyze the issues and make the recommendations to the board's planning committee. In turn, the committee determines how the strategic change initiatives will be developed and whether they will be sent to a community-led task force or to an internal group that involves staff and administrators. Other options include working with a particular department in the district or hiring a consultant to work on a specific issue.

As you can see, this type of process lends itself to a more effective board and administrative team. Rather than a long-range plan that gathers dust on a shelf, districts that use a strategic change process have a living document to work from that involves everyone. If you haven't considered this type of work, I urge you to do so. ■

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