

# Top 10 Tips for Effective Strategic Planning

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by Mark Willis



With the demands and complexities of public school systems in the 21st century, it is hard to imagine how school districts can continue raising the bar without effective and comprehensive strategic planning.

As I talk with people about strategic planning, I typically see people fall into one of two camps. Those who love it and those who hate it. Those that hate it usually do as a result of a bad experience. I can't say that I blame them.

We have all either experienced or heard stories where a lot of time, effort, and money was put into developing a strategic plan only to find it sit on a shelf. We call those S.P.O.T.S. (Strategic Plans on the Shelf).

Stakeholders were not included in the process, it was not effectively communicated, it was not embraced, nobody knew their role in it, and heaven forbid people actually used it to make decisions. As with most things, people like me who love strategic planning are typically those who also love lists. Therefore, I have come up with my own "Top Ten" list for effective strategic planning.

## **1. It is a PROCESS, not an EVENT.**

This is not something you do as a single event. It is a part of a continuous improvement process. It never ends. It is not something you do, check off the list, and then move on to something else.

## **2. Keep it SIMPLE.**

Strategic planning, when done right, is not simple. It is actually very comprehensive and complex. However, in order to effectively develop it, communicate it, and weave it into the fabric of your organization, you need to adopt a simple framework that everyone can easily understand. We believe that the entire process can be broken down into five essential questions as follows:

1. Who are we?
2. Where are we now?
3. Where do we want to go?
4. How will we know when we have arrived?
5. How do we plan to get there?



### Continuous Improvement Cycle

If you think about it, these five questions are not only at the core of effective strategic planning, but are also at the core of effective project management. Once this framework has been adopted, it can actually be used throughout the entire organization for a variety of purposes i.e. district strategic plan, technology plans, facilities plans, school improvement plans, project plans, etc.

### 3. Involve ALL stakeholders

Effective strategic planning is not done in isolation. This one cannot be over emphasized. Stakeholders need to be involved early and often. Don't wait until you have already developed a plan to engage them. Make them a part of the process before, during and after. After all, the stakeholders are the ones that you will have to depend on to implement the plan.

**3.5 Measurable Results** (slipped this in so it would hit a "round 10. See if anyone notices!) Your plan must include measurable results. We call them "Performance Measures". If not, then people will never know when the goal has been achieved.

### 4. Accountability

People are the ones who get things done. If your plan does not get down to the point of having specific people responsible for initiatives within your plan, then the work will never get done because nobody will have ownership in it.

### 5. Due Dates

If you don't have a due date, then there is also a good chance the work will never get done. Setting due dates help prioritize the work and provides the framework for allocating resources to get things done.

### 6. Costs

All initiatives have a cost, whether hard or soft. If they are not defined, then it is likely that they

will not be planned for in your budgeting process. Nothing can be more frustrating than going through the planning process only to find out that the things you said were important have not been accounted for in the budget. Budgeting is not separate from the strategic planning process, it is actually a part of it. Budgets are where you put your money where your mouth is. If your strategic plan says one thing but your budget says something entirely different, then you have a problem.

### **7. Align it.**



Your strategic plan cannot be separate from everything else. The strategic plan comes first and then everything else you do must be aligned back to it. This should include things like your budget, operational plans, school improvement plans, project plans, meetings (both board and staff meetings), policies, evaluations, etc. If it's not aligned then you should be asking yourself...why are we doing it?

### **8. Communicate it**

You can never do too much of this. Communicating the plan has to be done in multiple ways to engage and inform all stakeholders. Everyone should know what the plan is and what their role is in executing it. Find out how your various stakeholders prefer to receive information and try to meet them where they are.

### **9. Track it**

If you have no way to track it, then even the best of plans can fall to the wayside simply because it became too complicated or too time-consuming to keep up with it. Tools are now out there to automate and streamline this process...use them!

### **10. Live it**

For it to be labeled as “effective” planning, it must produce “effective” results. It has to become a part of the culture and climate of your organization. It has to be infused in everything you do . It should start from the top. If the board and leadership team “live it”, then it is more likely that people at all levels of the organization will too.

Strategic planning when done right is not easy. It takes a lot of time and hard work. There are no shortcuts. However, once embedded into the culture and climate of an organization, it does get easier as it becomes “the way” you do things. And most importantly, it DOES produce transformational results.

Well, there you have it. These are my top tips for effective strategic planning. If you have others, please share them so we can all learn from each other.

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2 Comments to “Top 10 Tips for Effective Strategic Planning”

1.  [Diane Sandifer](#) says:

[October 22, 2010 at 6:30 pm](#)

As a former board member from a school system who is currently implementing its fifth five-year strategic plan, I absolutely agree with your top 10. One added point I would emphasize...in “Involving ALL Stakeholders,” engage students in the process, too! We did not include students in our strategic plan process, and afterwards we really wished that we had asked for the input of our students. When the next time rolls around for planning where I live, students will indeed be involved in the collaboration!

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2.  [Tweets that mention Top 10 Tips for Effective Strategic Planning « Excellence in Governance and School Leadership -- Topsy.com](#) says:

[November 11, 2010 at 8:52 pm](#)

[...] This post was mentioned on Twitter by Lisa Dubernard, Lisa Dubernard, Lisa Dubernard, Lisa Dubernard, Lisa Dubernard and others. Lisa Dubernard said: Effective Strategic Planning Tip # 5 Your plan must have specific people responsible for initiatives within your plan. <http://bit.ly/cxwt4k> [...]