

An Overview of the Strategic Planning Process

Prepared for Boerne ISD
Strategic Planning Team



Benefits of Strategic Planning

- Focused, purposeful planning
- Unity of purpose throughout the district and community
- Increased community involvement
- Planning for every part of the district
- Filter for all decisions
- Roadmap for daily work
- Can truly influence the future of the district



Strategic vs. Operational Planning

□ Operational

- Shorter-term planning
- Focuses on maintenance of organization
- Focuses on programs, projects
- Budget-Driven



Strategic vs. Operational Planning

□ Strategic

- Longer-term planning
- Focuses on growth or change of organization
- Looks at whole systems
- Values/Mission-driven



Strategic Plan Components

Beliefs

Vision

Mission

Strategic Objectives

Strategies

Action Plans

Beliefs

Formal statements of the district's:

Fundamental values

Deep and abiding convictions

Non-negotiable ethical principles

Moral imperatives

Vision

- Defines the future the district wants to create
- Dynamic statement designed to unleash the district's energy
- Inspires all stakeholders to commitment
- Bridges the present with the future
- Should be idealistic and unique
- Must be lofty – all stakeholders have to “stretch” to reach the vision
- *“What would the world look like if our beliefs were fully realized?”*

Mission

- Identifies why the district exists

- Mission tests the strategic plan
 - Do all parts of the strategic plan support the mission?
 - If implemented, will the strategic plan accomplish the mission?

- Mission is a statement of the district's
 - Purpose
 - Function
 - Client



Strategic Objectives

- ❑ The district's desired results
 - ❑ Supports mission
 - ❑ Requires the district to “stretch”
 - ❑ Redefines “realistic”
 - ❑ Stated in measurable terms (time, \$\$\$, quantity, quality)
 - ❑ Observable (district knows when objectives are accomplished)



Strategies

- Broad statements that describe how the district's resources will be deployed to achieve the objectives
 - ✓ Relevant to the mission and objectives
 - ✓ Provides total district concentration of effort and resources



Action Plans

- Explicit step-by-step processes for accomplishing each strategy
 - Describes the action required for implementation
 - Separately-assignable projects
 - Relevant to given strategy
 - Provides optimal return on investment
 - Supports all components of the strategic plan



Strategic Planning Process

Phase I:

- ❑ Board of Trustees establishes beliefs, vision, and categorical framework
- ❑ Strategic Planning Team Established
- ❑ 2 day retreat held – mission, strategic objectives, and strategies developed
- ❑ Progress reported to Board of Trustees

Phase II:

- ❑ Action Teams formed – an action team is formed for each strategy (Ex: 10 strategies = 10 Action Teams) – Superintendent assigns Action Team Leader and team members (teams are usually 10 to 15 members)
- ❑ Action Teams work independently for 2 to 3 months developing action plans to support the assigned strategy

Strategic Planning Process

Phase III:

- ❑ Action Team Leaders present action plans to Strategic Planning Committee at a 1-day retreat
- ❑ Strategic Planning Committee can accept the action plan as presented or send back to the Action Team for more work
- ❑ Once all action plans are accepted, the Board of Trustees approves the Strategic Plan.

Phase IV:

- ❑ Superintendent assigns action plans to specific years to begin implementation (Ex: Action Plan 4.1 will begin in 2018-19, Action Plan 7.2 will begin in 2019-20)
- ❑ Superintendent assigns action plan ownership to specific administrators
- ❑ Accountability system is developed

Strategic Planning Process

□ Annual Updates

- Strategic Planning Team meets annually to receive updates on assigned action plans by action plan owners
- Strategic Planning Team can decide action plan is completed or more work needs to be done
- Action plan is considered complete when specific tasks are completed or the tasks become an operational part of the district (*plans are no longer strategic but are now operational*)
- All action plans will be completed within the 3 to 5 year life of the strategic plan