THINKING STRATEGICALLY ABOUT THE FUTURE

Strategic Planning Committee (SPC) Launch Meeting
Tuesday, January 13, 2015

Prepared by Amy Main Morgenstern
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Build a common understanding of the strategic planning context and prepare to solicit stakeholder views to help inform decision-making.
The key for all organizations—public, private, and nonprofit alike—is to be disciplined and intentional in planning, decision-making, executing, and assessing progress.

- Jim Collins -
Round Robin of Introductions

Briefly share one sentence responses to each Q:

1) Why did you say “yes” to serving on this SPC?

2) What’s one perspective/point of reference you bring to the SPC that would be helpful for us to know?
What We’ll Accomplish

- **Purpose:** Build understanding of the planning context & prepare to solicit views.

- **Process Overview & SPC Charge**

- **Get Grounded in ‘What Is’**

- **Prepare to “Go Into the Field” to Solicit Stakeholder Views**
  - Who to Ask
  - What to Ask
  - How to Invite

- **Next Steps, Timetable & Concluding Remarks**

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What is Strategic Planning?

- Process of **making informed decisions** about future direction and priorities

- **Surfaces best thinking** on how to capitalize on opportunities, build upon core competencies, and confront challenges

- **Forces trade-offs among alternatives** – an organization cannot be all things to all people. Hard choices must be made about what the organization will and will **not** do in the future given available resources

- Results in strategies to **guide the organization’s resource allocation** and capacity building efforts

- Establishes a **clear set of indicators** to monitor and evaluate outcomes, impact & organizational performance

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Thinking & Planning Strategically Results In Determining:

[From The Bridgespan Group on Business Planning]

♦ **STRATEGIC CLARITY** – *Intended Impact*: Concrete description of impact for which the District will hold itself accountable over a specified period of time

♦ **STRATEGIC PRIORITIES** – Specific actions and activities that must take place to achieve the intended impact

♦ **RESOURCE IMPLICATIONS** – Financial, human, and organizational resources needed to pursue priorities and steps to secure them

♦ **PERFORMANCE MEASURES** – Quantitative and qualitative milestones that make it possible to measure progress toward intended impact
Planning Approach & Timetable (1-15-15 DRAFT)

Jan ----- Feb ------ March ----------------------------- April ------------------------ May ------------------- June ----------------- On-Going

Phase I: Set the Decision-Making Context
- Review & prepare to build upon relevant CH-UH information and recently completed research
- CH-UH prepares ‘hard data’ trends to understand external environment and internal conditions
- Launch strategic thinking at SPC session #1 (1.13) & prepare to go ‘into the field’ to hear from stakeholders
- Frame Qs & hypotheses to test:
  > 8 focus groups
  > 2 large community groups
  > On-line student survey
- Prepare stakeholder summary report

Phase II: Confirm Aspirations/Strategic Intent
[To What End, For Whom, Why, With Whom]
- Consider stakeholder input, additional ‘hard data’ and implications (SPC #2 & BOE plus expanded staff)
  > Emerging priorities
  > What success looks like
- Determine criteria used to make decisions & trade-offs
- Develop proposed Aspirations and goals: key things CH-UH will and will not do to produce desired outcomes (SPC #3)
- Confirm working draft of Aspirations with BOE (BOE #2)

Phase III: Develop Implementation Section
[How, by Whom, When, Cost/Revenue]
- Professional staff drafts & SPC recommends proposed Implementation Section for full Board approval (SPC#4)
  ✓ Strategies
  ✓ Objectives & Tactics
  ✓ Metrics & Milestones
  ✓ Responsible Parties
  ✓ Required Resources ($$$ & People, Infrastructure)
  ✓ Timeline

Phase IV: Implement, Learn, Refine & Evaluate
- Board discussion and approval (BOE #3)
- CH-UH:
  ✓ Implements
  ✓ Learns from
  ✓ Evaluates
  ✓ Adjusts
  ✓ Reports on progress
  ✓ Celebrates continued successes!

There is a sense of urgency re: completing the 5-year Strategic Plan to help inform 2015-2016 plans.

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What are our purpose and goals?

How will we achieve them, what produces desired results?

What will get us there?

What additional skills will we need?

How are we organized and supported to deliver?

What do we believe? How will we accelerate progress?

How will we measure performance & results, work together?

Organizational Capacity Assessment Tool

1. Aspirations
2. Strategy
3. Leadership, Board and staff
4. Funding
5. Marketing and communications
6. Business processes
7. Specialized skills
8. Infrastructure and organizational structure

McKinsey & Co.

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The SPC’s Charge: To Assist in Developing the Strategic Plan

In partnership with the District’s professional staff & being accountable to the BOE:

1) Consider how the District needs to evolve, align around desired outcomes
2) Pose tough questions, be candid and respectful
3) Attend 1 community stakeholder gathering
4) Consider stakeholder views to set priorities knowing trade-offs are necessary
5) Confirm limited # of strategic priorities
6) Determine what the District will and will not do, knowing what’s in and outside the District’s control and budget
7) Establish clear, measurable goals
8) Recommend approval of the Plan to the BOE
9) As requested, participate in subsequent discussions of the District’s progress

➢ The SPC recommends to the BOE, then concludes its work.
Discussion Guidelines

- Be concise & as active a listener as you are a speaker
- Attend to what is said, not who said what
- Be direct and candid about what you think
- Acknowledge biases (we all have them)
- Use information to learn/create solutions, not to criticize
- Ask seemingly naïve questions (others will be glad!)
- Respectfully consider divergent opinions, new ideas
- Enjoy working together!

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Starting Point Briefing on ‘What Is’

- District’s Students: who they are & are not
- Student experiences & outcomes: in and outside classroom
- Stakeholder Perceptions (see HYA Report, pg. 2)
- Current Vision, Mission, Core Beliefs, Strategy & Motto
Examples of Strengths Identified by Stakeholders
[See HYA February 2014 Report, page 2]

1) Offerings/student participation in successful courses & extra-curricular programs
2) Pre-school initiatives
3) AP courses
4) Exceptionally strong music & performing arts departments
5) Robust athletic department
6) Alumni prepared for the “real” world
7) Facilities and passage of bond issue
8) Committed teachers who “go the extra mile” for students
9) Quality of life and advantages to living, working and raising a family in area
10) Diversity of student body and community
11) # organizations committed to helping District ↑ performance at high level of excellence

➢ There are many assets upon which to build
Examples of Challenges/Concerns/Issues

[See HYA February 2014 Report, page 2]

1) Gap in public perception contrasted with quality of programs & services offered
2) Acute need to build relationships with all constituent groups within District, community
3) Ability to address needs of ↑ transient, poorer student body living in less engaged homes
4) Expectation District will lead the way in connecting with families and using community partners to meet the needs of all children, particularly those most at risk of failing
5) Desire to create a District that redefines excellence in education within Ohio, the nation
6) Identifying, recruiting and retaining highest quality staff, that more closely reflects students’ racial composition
7) Maintaining laser like focus on a limited # of academic improvement efforts & initiatives
8) Need to reduce mission confusion & staff feeling overwhelmed
9) Stability derived from a long-term Superintendent, to address #7 & #8
10) Parent frustration with current high school learning communities design

➢ There are also numerous challenges to be addressed
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The most serious mistakes are not being made as a result of wrong answers. The true dangerous thing is asking the wrong question.

- Peter Drucker -

➢ To develop a thoughtful strategy, it is essential to step back and challenge the status quo.
➢ Asking questions spurs exploration, innovation, and definition.
## Phase I: Set the Decision-Making Context

**Solicit Stakeholder Views Via:**

1. **~8 Constituent Focus Groups**
   - Mix of staff & faculty (n=2)
   - Students (n=1)
   - Parents: Private (n=1) & CH-UH (n=1)
   - Mix of business, clergy, realtors, community partners, elected officials (n=3)

2. **Use Focus Group Input to Help Frame Subsequent Questions**
   - 2 Large Community Gatherings
   - On-line Middle & High School Student Survey Questions

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Prepare to “Go Into the Field” – What to Ask (STARTER DRAFT)

Phase I: Set the Decision-Making Context

Drawing Upon What’s Been Conveyed...

- About what will it be most important and helpful to hear, to inform decision-making re: the District’s intended impact and strategic priorities?
- Any specific areas/ideas about which the District wants to hear?
- Is the HYA 5-part Key a helpful one for framing questions (see VV, IL, CE, CC, M described on flipchart)?

Examples of Broad To What End Questions:
✓ How do we define success?
✓ Anything CH-UH School District should ‘stop doing’?
✓ Recommended (new) community partners?
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Steps for Inviting Individuals

- Approach to inviting individuals
- Ways SPC members might help to maximize participation
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Next Steps & Timetable

- **Who does what in preparing for, completing stakeholder input**

- **SPC involvement prior to March meeting (date tbd) re: findings:**
  - ✓ Update on stakeholders confirmed, participation status
  - ✓ Attend at least one large community gathering
  - ✓ Other:
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