

THINKING STRATEGICALLY ABOUT THE FUTURE



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

Meeting Purpose

- Build a common understanding of the strategic planning context and prepare to solicit stakeholder views to help inform decision-making.


Why Plan Now?



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

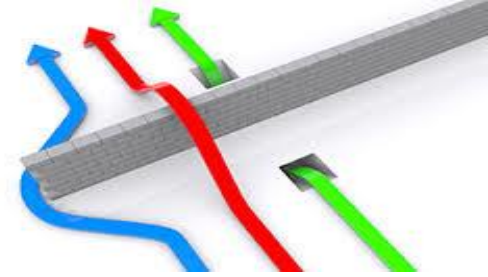


*introduce
yourself*

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*



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

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

Phase II: Confirm Aspirations/Strategic Intent *[To What End, For Whom, Why, With Whom]*

Phase III: Develop Implementation Section *[How, by Whom, When, Cost/Revenue]*

Phase IV: Implement, Learn, Refine & Evaluate

- 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:
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- Consider stakeholder input, additional 'hard data' and implications **(SPC #2 & BOE plus expanded staff)**
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 - ✓ Strategies
 - ✓ Objectives & Tactics
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 - ✓ Responsible Parties
 - ✓ Required Resources (\$\$\$ & People, Infrastructure)
 - ✓ Timeline

- Board discussion and approval **(BOE #3)**
- CH-UH:
 - ✓ Implements
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 - ✓ Evaluates
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 - ✓ Celebrates continued successes!

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

Organizational Capacity Assessment Tool * OCAT 2.0 [Revised 2012 – Publicly Available Online]

With Amy Morgenstern Additions



McKinsey & Co.



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*

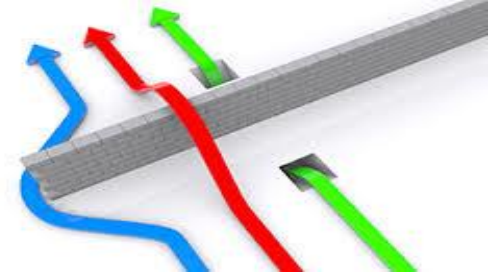
➤ *The SPC recommends to the BOE, then concludes its work.*

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



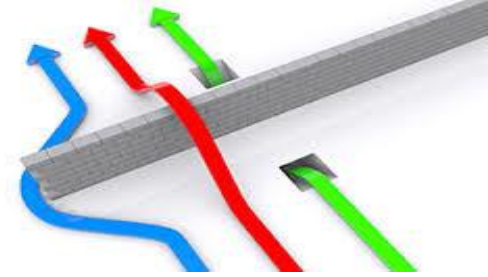
Examples of Challenges/Concerns/Issues

[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.

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

-----Jan ----- Feb -----Early March -----

Phase I: Set the Decision-Making Context

Solicit Stakeholder Views Via:

1) ~8 Constituent Focus Groups with, for example:

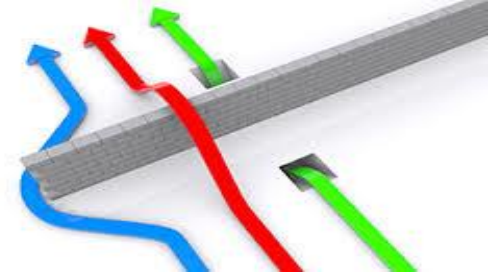
- ✓ Mix of staff & faculty (n=2)
- ✓ Students (n=1)
- ✓ Parents: Private (n=1) & CH-UH (n=1)
- ✓ Mix of business, clergy, realtors, community partners, elected officials (n=3)

➤ Use Focus Group Input to Help Frame Subsequent Questions

2)

- ✓ 2 Large Community Gatherings
- ✓ On-line Middle & High School Student Survey Questions

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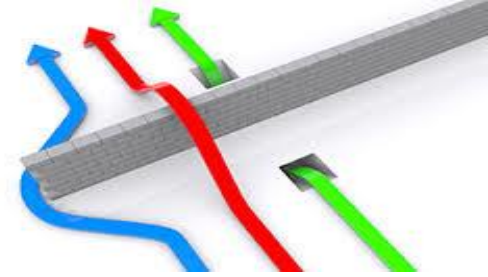
Drawing Upon What’s Been Conveyed...

- 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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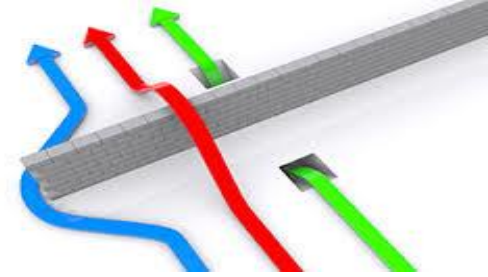


Steps for Inviting Individuals

- *Approach to inviting individuals*
- *Ways SPC members might help to maximize participation*



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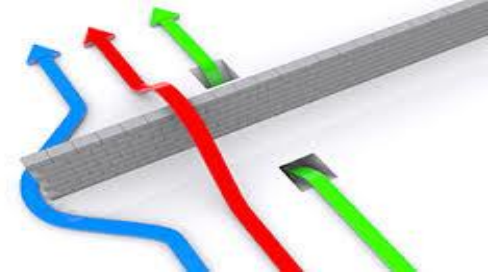


Next Steps & Timetable

- *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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Adjourn

