# Strategic Planning for Successful School Districts

Ken DeSieghardt, Patron Insight
David Luther, Missouri Association of School Administrators
Aaron Zalis, Kelly Hinshaw & Craig Hounsom, Rolla School District

MASA — MISSOURI ASSOCIATION OF SCHOOL ADMINISTRATORS

PATRON INSIGHT

# Strategic Planning

*It doesn't have to be sca[ry] intimidating!*

**You might need strategic planning if.**

You want to know if "everyone is saying" what everyone tells you "everyone is saying."

You are new and want to get the lay of the land.

You want to know what patrons are most interested in, and what they really (REALLY) wish you'd quit talking about.

You have big plans, but you are uncertain if anyone agrees with the

Facts don't seem to change opinions among stakeholders.

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# Strategic Planning Models:  RACE, R-PIE and PDSA

RACE = Research; Analysis; Communicate; Evaluate

R-PIE = Research; Planning; Implementation; Evaluation

(O)PDSA = (Observe); Plan; Do; Study; Act

# Research

What do we need to know when we are done to make the decisions we need to make? *(In other words, why are we doing strategic planning?)*

- Make a list (topics, not questions)
- Tangible items only
- Careful with questions that identify individuals by name
- At least 80% statistical; no more than 20% open-ended
- No "I'm just curious" topics allowed.

# Gather any stakeholder research you have on file for the last 10 years or so – formal or informal – such as:

STEP 2

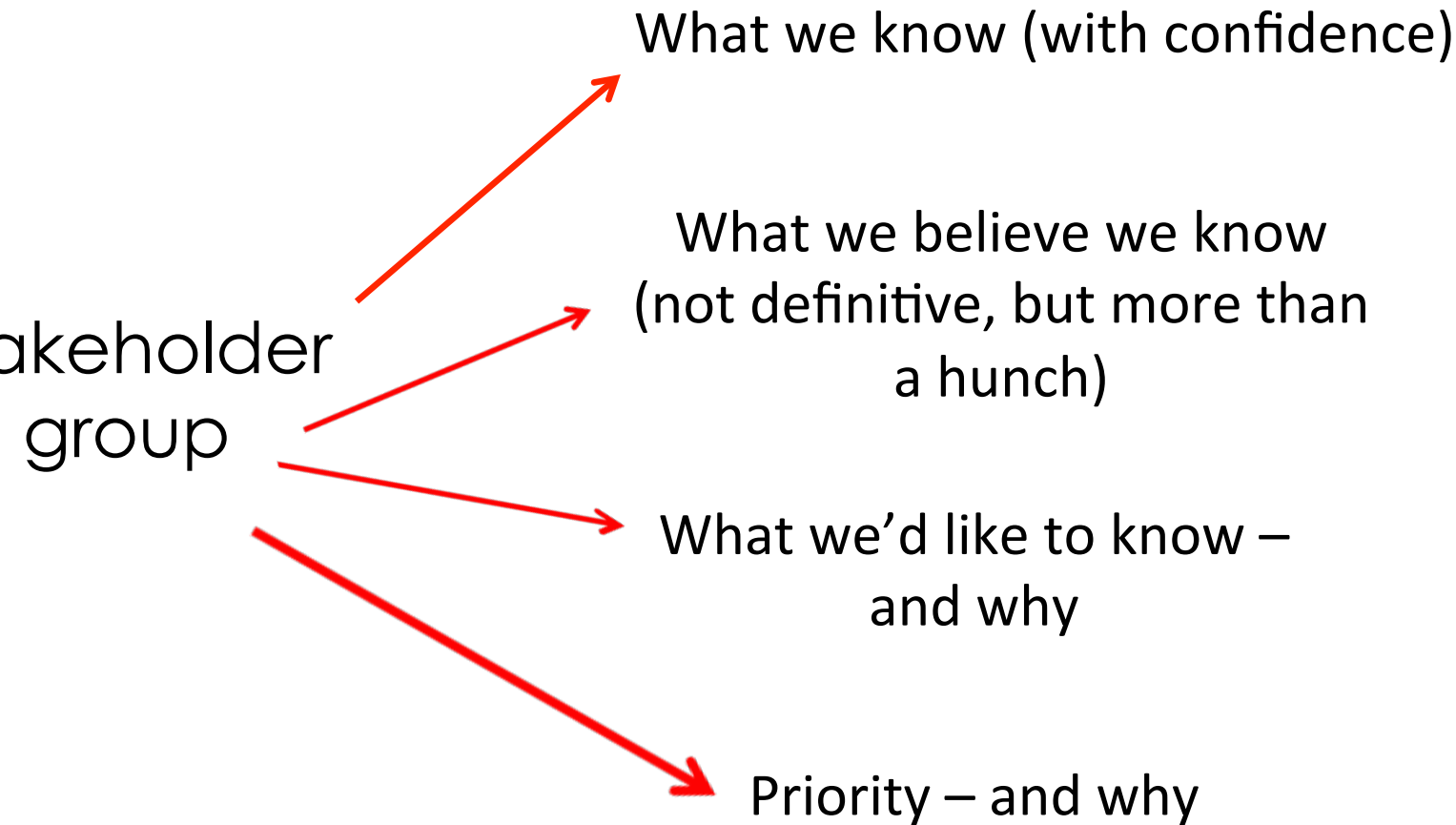Parent surveys randomly collected (during P/T conferences, etc.)

Surveys taken in committee processes (LRFP, etc.)

Online community, staff, etc. surveys

Exit surveys from staff

Feedback forms from students re: classes

In other words, anything where measurement has been taken helps create at least a fuzzy picture

# Create separate status documents for each stakeholder group

What we know (with confidence)

What we believe we know
(not definitive, but more than
a hunch)

stakeholder
group

What we'd like to know –
and why

Priority – and why

STEP

# Methodology: Telephone research

- Pros
  - Can get very specific geographically
  - Can ask complex questions
  - Provides statistical reliability
  - Creates foundation for tracking progress (cause/effect) over specific time periods
  - Confidential (if outside resources are used)

- Cons
  - Can be expensive
  - Staff or volunteers not qualified to conduct interviews
  - Very important to put every question to the "what will we do with this info?" test
  - Perception that "nobody but old people talks to survey takers"

# Methodology: Online research

- Pros
  - Very inexpensive
  - Ideal for "captive" audiences
  - Enhanced features allow for more complex survey structure
  - Can provide closed-end and open-ended questions
  - Confidential

- Cons
  - Respondents are self-selected; data is not statistically precise
  - Modest ballot-box stuffing is possible (for those who are really unhappy!)
  - Not all people will answer all the questions
  - Open-ended responses can be, well, interesting

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# Methodology: Focus groups

- Pros
  - Best way to hear the "voice of the stakeholder"
  - Group process may lead to unexpected findings
  - Written exercises are still possible – and a good tool
  - If handled correctly, can be seen as fun by participants – which spreads to the community

- Cons
  - Securing participation can be a challenge; must politely browbeat people to remind them they said "yes"
  - Moderation requires balance and being "strategically dense"
  - Not statistically valid data (and not intended to be)

# Methodology: Ongoing committees

- Pros
  - Opportunity to address complicated issues over time
  - People who participate really want to be there
  - Provides good PR opportunities (discussing committee activities)
  - Should be calendar-based, meaning an end date and product is known and followed.

- Cons
  - Participation requires a commitment that not all are going to be able to offer
  - Attendance drop-off is common
  - Risk of appearing to lead the group (the Delphi Approach)
  - The blowhard factor

# Methodology: Key Opinion Leader interviews

- Pros
  - Private time with influential individuals
  - Positive message to these individuals that their opinions are valued
  - Working with an outline – rather than a question list – provides an opportunity to take the conversation where it needs to go
  - Creates opportunity to ask for future participation

- Cons
  - Who to include? Exclude?
  - On-site is better than over the telephone, but that requires a greater time commitment
  - Who to do the interviewing? (Risk that participant will not want to "hurt anyone's feelings.")
  - Not statistically valid (and not intended to be)

# Methodology: Tracking social media trends

- Pros
  - Inexpensive, if you don't obsess over it
  - The equivalent of "putting a finger in the air to see which way the wind is blowing"

- Cons
  - How to respond to incorrect information – or even should you?
  - Monitoring who is posting within the district
  - Too easy to get dragged into an argument
  - Setting – and sticking to – key messages can be a challenge

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At your table, define the key climate topics you'd like to know from the following audiences:

- Staff
- Parents
- Students
- Community

**The Second Assignment**

At your table, chart a course for how you are going to collect and analyze that information:
- Who's involved?
- What role will they play?

## Other big questions…

What can be done internally and in what situations would outside help be best?

Who gets involved with approving the final research instruments used for strategic planning (Hint: If you involve your whole BOE, it will never get done)

How will bad news be delivered – if any surfaces in this process? (Strategic planning is a snapshot of today, but mostly a look forward.)

How do we keep from hearing only from the usual suspects?

What role does the Superintendent play?

# Communicate

# Communicating the Plan:

- Who is/are your audience/s?
- What do they want/need to know?
- How do they want to receive information?
- What is the message?
- Who is the messenger?

# Communicating the Plan: Audiences

## Internal Audiences:

- "When the house is on fire, tell those inside first."
- Who are your internal audiences?

## External Audiences

- Who are your external audiences?

# Communicating the Plan: Tools

| | |
|---|---|
| Open Meetings | Large Groups |
| Press Conferences | Small Groups |
| Email | Video |
| Social Media | Auto-Calls |
| Apps | Personal Calls |
| Letters home | Direct Mail |
| Publications | Local media |
| Mass Media | Others? |

# Communicating the Plan: Message

- Clear, concise and consistent
- Supports district mission/plans
- Relevant and accurate: is supported by data
- Compelling – Simple – Memorable
- Consistent
- *As a school district, all of your messages must keep in mind the benefits to students*

# Communicating the Plan: Message

## 30-Word Home Base (elevator pitch)

- First 30 words are absorbed by audience
- Main point + 3 supporting points
- Takes 12-15 seconds to say
- About the length of a TV sound bite
- Forms basis of your "message map"
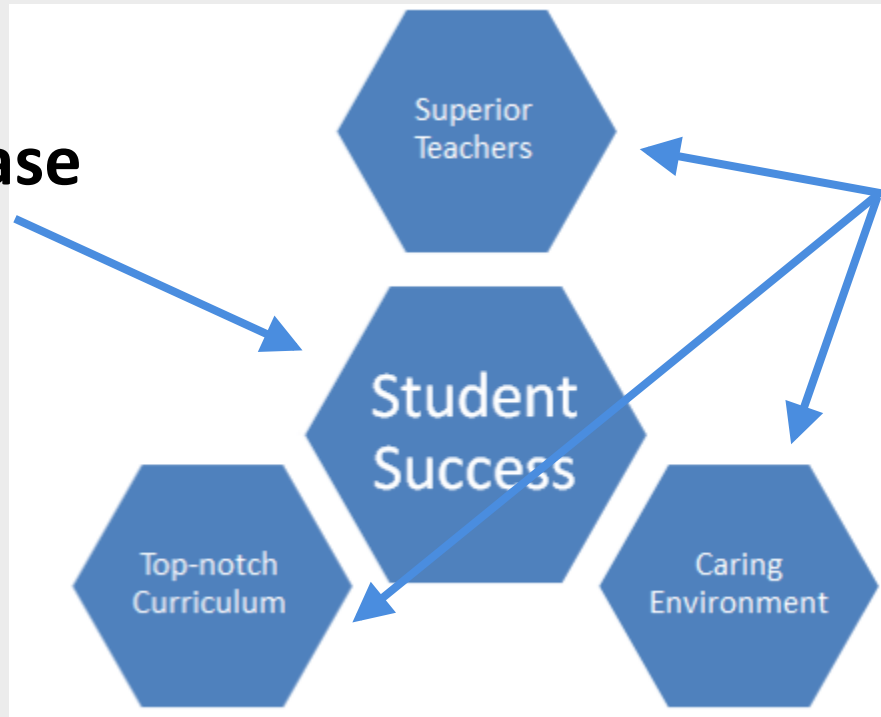
# Communicating the Plan: Message Map

Sample Home Base -- First 30 words are absorbed by audience

- Parkway Schools help all students succeed by providing a great education with superior teachers, an outstanding curriculum and a caring environment.
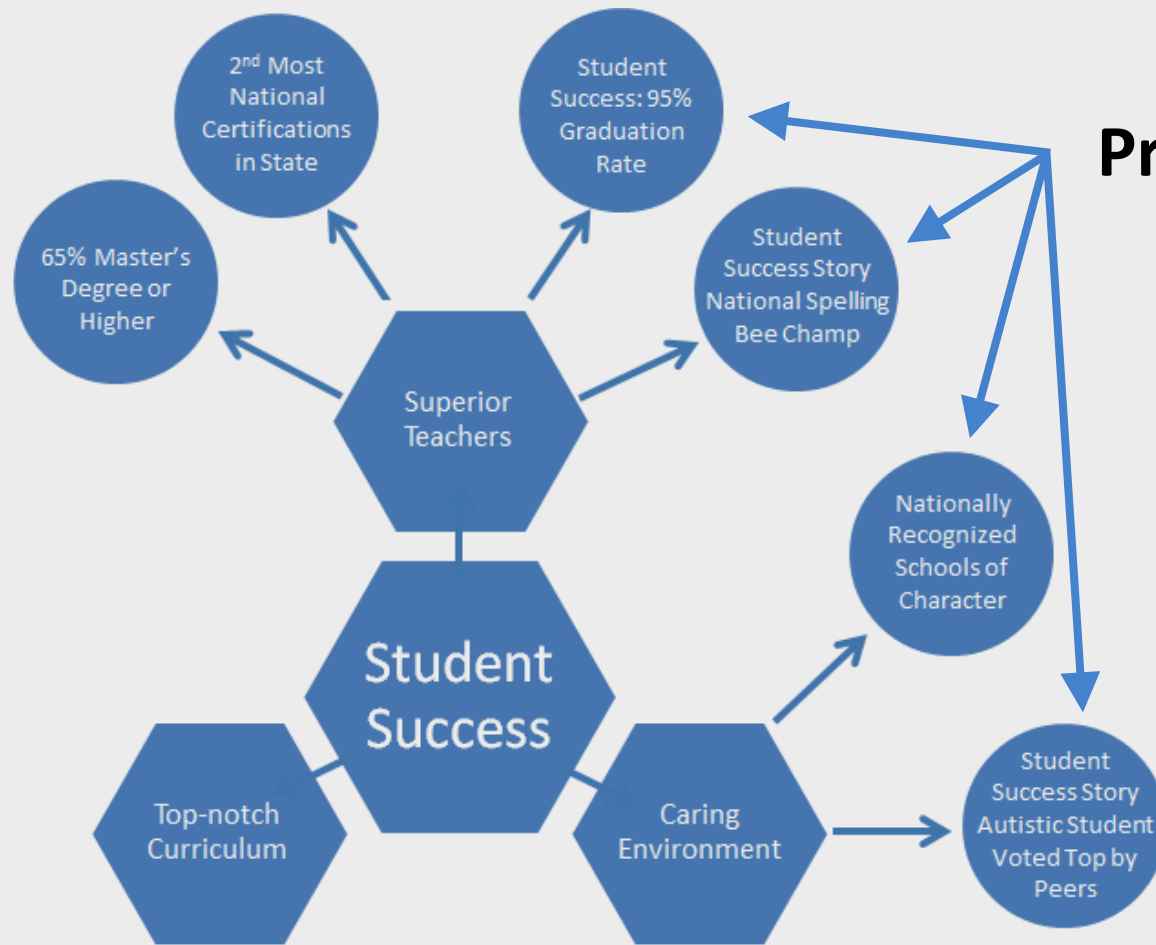
# Use Home Base to Map Your Message

# Communicating the Plan: Message

Sample Home Base -- First 30 words are absorbed by audience

- The Appleton School District's strategic plan supports student learning by providing clear direction for curriculum development, facility growth and financial stability.

The Assignment

Third

At your table, Develop a "Home Base" message for your district's strategic plan.
Include your supporting points and start thinking about proof points.

# Evaluate

- Did you accomplish your objectives? Prove it.
- Identify ways to improve and recommendations for the future
- Measure effectiveness of the program against objectives
- Adjust the plan, materials, etc., before going forward
- Can serve as research for the next phase or program
- Were you able to get key messages out and heard?

# Evaluating the Plan

Evaluate <u>throughout</u> the process:

- Online surveys
- Discussion groups
- Low level check-in

Evaluate at the end of the process
*(although often there is no "end")*

# Rolla's Process

**Strategic Planning**
**CSIP**
**Facility Planning**

# Be Aware

**Time**
**Manpower**
**Budget**
**Perceptions (Board Retreat)**

# Review

**Strategic planning models**
**Research**
**Communication**
**Evaluation**
**Rolla's experience**

# Contact Information

Ken DeSieghardt
Patron Insight, Inc.
ken@patroninsight.com
Cell – 816-225-0668

David Luther
MASA
David.luther@mcsa.org
Office – 573-638-4825

Rolla Team:  Aaron Zalis, Kelly
Hinshaw & Craig Hounsom
AZalis@rolla.k12.mo.us
Office – 573-458-0100