

OVERVIEW OF HALLADAY EDUCATION GROUP'S STRATEGIC PLANNING PROCESS

Planning need not be tedious, irrelevant, or expensive. On the contrary, it can be a process that arouses interest and support and can be of enormous value to your organization's growth. The ultimate product of planning is the plan – your board's determination of the strategies that will prioritize the decisions of your organization and the annual operational plan -- the blueprint for your school's future. Our process of strategic planning is focused and raises a progression of questions that helps to examine assumptions, gather and incorporate information about the present, and anticipate the environment in which the school will be working in the future, and asks:

- ▶▶ Where are you now?
- ▶▶ Where do you want to be?
- ▶▶ How do you get there?
- ▶▶ How do you measure your progress and know you've gotten there?



VALUE TO YOUR SCHOOL

Many schools spend their time reacting to unexpected changes instead of anticipating and preparing for them. This is called crisis management. As the world's economy shifts, powerful forces are impacting your school, your students, and your staff. Now more than ever, your board needs a comprehensive plan to maximize your school's strengths, foresee your threats, reduce your weaknesses, and take advantage of future opportunities. Organizations caught off guard spend a great deal of time and energy "playing catch up". They use up their energy coping with immediate problems with little energy left to anticipate and prepare for the next challenge. This vicious cycle locks many organizations into a reactive posture. It does not have to be that way. A sensible alternative is our well tested planning process that provides a viable alternative to crisis management. Strategic planning is a step by step process with definite goals and end products that can be implemented and evaluated. Very simply, it is the process by which your school will look into the future, paint a picture of that future based on current events, and influence the forces that will affect you. This will allow you to:

- Gain credibility for your organization amongst donors and identify critical projects for their investment;
- Identify areas of operation needing attention and use it as a springboard to strengthen school performance;
- Identify and reach consensus on critical issues before they become a crisis (e.g., finance, enrollment, marketing, fundraising, human resources, academic programs, facilities);
- Articulate a uniform, shared mission and vision, and provide a clearer focus for the organization, producing more efficiency and effectiveness, and participation and ownership;
- Build trust, respect, team-work, and communication amongst board members and the Head of School;
- Ensure that board members understand their roles, responsibilities, and issues;
- Monitor performance and provide benchmarks from which progress and performance can be measured;

OUR STRATEGIC PLANNING PROCESS

The following provides a framework for the process that we utilize in the development of your Strategic Plan:

1. Determine the scope of your Strategic Planning process and subsequent steps and timelines;
2. Orient the board, administration, faculty, and parents with our planning process;
3. Obtain community views on the school's performance (e.g., interviews, focus groups, online surveys);
4. Assemble internal and external background data to determine where you are now;

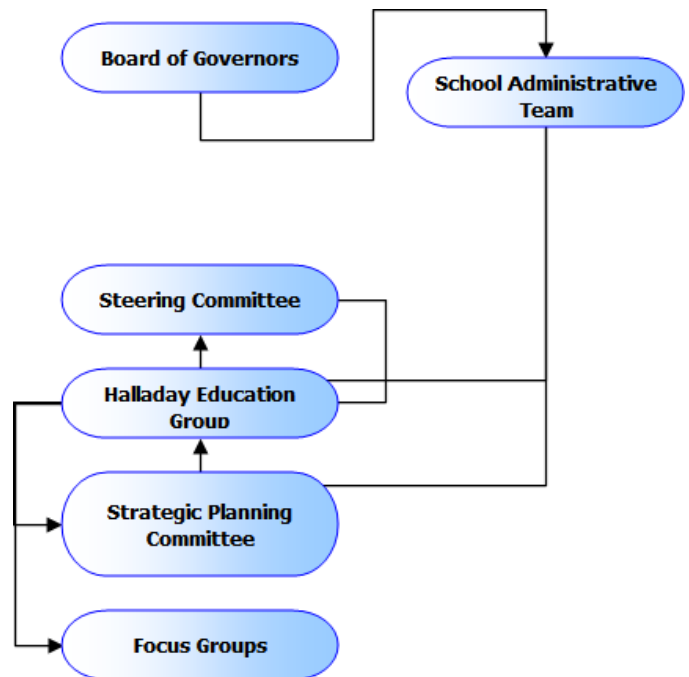
5. Re/define the vision, mission, core values, and educational philosophy of where you want to be;
6. Assess your current situation and your strengths, weaknesses, opportunities, and threats (SWOT's);
7. Identify and frame critical issues and priorities for change;
8. Develop strategic goals and objectives for success;
9. Support development of the action plans for improvement;
10. Assist the planning team in presenting the results to your board and community;
11. Assist with the preparation of your internal and public Strategic Planning document(s).



RESOURCE COMMITMENTS

Doug Halladay would be the project leader for your plan, and typically involves the following groups in the development of your strategic plan. However, this would be customized to your needs

1. **Strategic Planning Steering Committee (SPSC):** Consists of the Senior Administrators and/or Board Members who will provide advice and oversight on the planning process (e.g., process, budget, membership, deliverables, work plan, agenda, communication, present strategic plan to the board for approval, editing).
2. **Strategic Planning Committee (SPC):** Consists of selected representatives of the school's community (e.g., Board, Parents, Staff) who offer assistance with developing the core values and education philosophy, de/refining the vision and mission statements, collecting and reviewing base-line data, assessing internal and external environment, matching strengths and weaknesses to the opportunities and threats (SWOT's), identify critical issues, strategic goals, and objectives.
3. **Focus Groups:** Consist of parents, students, staff, and other stakeholder groups that will be struck as needed to provide feedback on the school's performance and direction, as well as the online surveys.



WORK PLAN

The details of your work plan will be adjusted to your needs. Typically our planning process is completed within 16-22 weeks. The following is intended as an overview of our process to develop your strategic plan. Meetings at your school are indicated in the **shaded boxes**.

PHASE 1: PLANNING AND RESEARCH

1. Conduct planning meeting with the Steering Committee to define parameters of the Strategic Planning Process:

- Planning approach;
- Timelines;
- Scope;
- Deliverables;
- Data collection content & process;
- Committee membership;
- Clarify roles & responsibilities;
- Planning Retreat(s);
- Communications plan.

2. Gather & Summarize Data & Constituent Perspectives (e.g., staff, parents, students):

- Implement Surveys;
- Gather external & internal data;
- Conduct Focus groups.

3. **Conduct Focus Group meetings on campus with:**

- Board;
- Administration;
- Staff;
- Parents;
- Students.

PHASE 2: PURPOSE & DIRECTION

Retreat #1: Strategic Planning Committee:

- Review data collected to identify critical issues & questions;
- SWOT Analysis;
- Re/define mission, vision, core values, and/or educational philosophy;
- Identify gaps between current performance and critical issues of the organization holding it back from the desired future;
- Brainstorm & prioritize external & internal strategic issues;
- Develop goals and objectives for each goal.

PHASE 3: ACTION PLANNING

Retreat #2: Strategic Planning Committee retreat (Review Draft #1B):

- Review/refine and approve the mission, vision, & core values;
- Review/refine and approve introduction, goals & objectives;
- Develop action plan(s) for each goal;
- Refine Final version of *External* Strategic Planning Document (introduction, goals and objectives).
- Complete development of draft #1 action plan(s) for *Internal* Strategic Planning Document

PHASE 4: FINALIZE & PUBLISH PLAN

1. Final draft of the Strategic Plan is prepared for board approval and publication for distribution to your community to celebrate.

2. Year One Action Plan Initiatives prioritized, Implementation Team selected and trained, and plan implementation begins.