

## Setting Strategic Direction

### Overall Goal:

The goal of strategic planning is to create a stronger school community that is more self-aware and has a greater sense of its priorities, goals, and vision in order to maximize opportunities and minimize risks.

### Why plan?

- Provide a key to institutional sustainability;
- Uphold mission;
- Develop a culture of planning; and
- Develop a shared vision of the future.

### What are the benefits of planning?

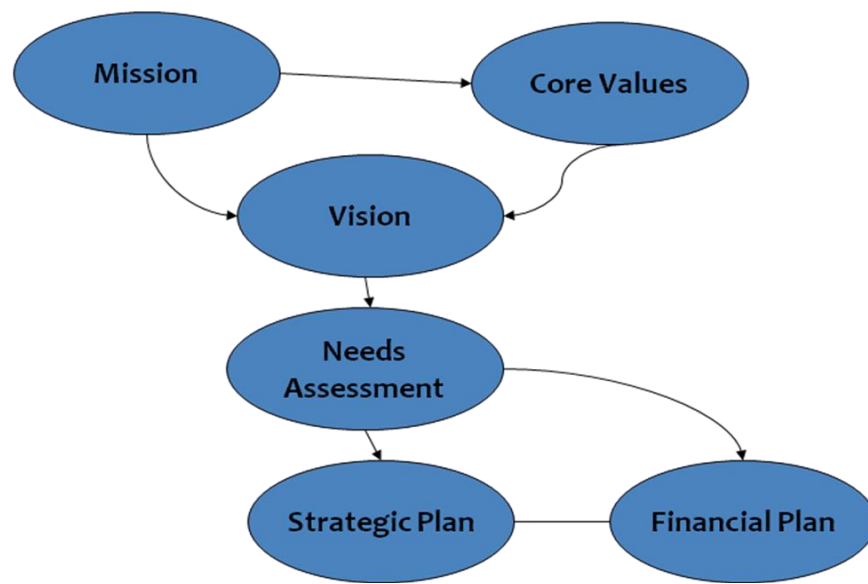
- Develop a robust understanding of what the school is and where it is going;
- Recognize the school's strengths and weaknesses; and
- Be aware of the threats, and know where opportunities lie for improvement and growth.

### Mission → → Vision?

- A **mission statement** lets people know *what a school is doing now*, basically describing its purpose and why it exists.
- The **core values/core principles** *uphold* the school's mission and are reflected in the *school's culture and priorities*.
- The **vision** statement is focused on the future, showcasing where the *school will be in years to come*.
- The **strategic plan** and **strategic (multi-year) financial plan** *explain* how all this will happen and *guide* the school for a period years.

### A Model for Strategic Planning

*Note: There are many models of strategic planning. One model is explained here, regardless of the model, it is best practice for the Board and Head of School to include school administrators, if applicable, in the strategic planning process.*



A strategic plan is a Board-generated and Board-approved document that guides the school's operation and growth for a period of 3-5 years. It is accompanied by a strategic financial plan.

The plan should be guided by the school's mission, and it should include a vision statement, strategic priorities/goals, rationales, and implementation plans (action items, timeline, funding sources, and people responsible for oversight). A strategic plan without an accompanying strategic financial plan is a merely a "wish list."

Often the Board will hold a one or two-day retreat, which may or may not be facilitated by consultants, to develop the vision statement and strategic priorities/goals. It is not reasonable to expect that the entire strategic plan and financial plan can be written during this one-day retreat. Prior to the retreat, the school might gather feedback from constituent groups via survey/questionnaire or focus groups. Following the retreat, the Board, Head of School, and Business Manager will fine-tune the strategic planning document and develop an accompanying strategic financial plan. The planning process could take three months to a year to produce the final documents that the Board then approves for implementation.

In addition to developing these guiding documents, the Board and the Head of School should determine (1) the part(s) of and the means by which the strategic plan will be shared with the school community, and (2) adopt a system by which the strategic plan and its strategic financial plan will receive regular review, oversight, and updates.

#### **Southwestern Association of Episcopal Schools (SAES) Resources**

SAES staff members and consultants are available to assist member schools in the strategic planning process. Please contact David Madison, SAES Executive Director, for more information.