Strategic Planning: Doing the Right Things

Monica Aguilar, Executive Director, Nuestros Valores Charter School

Hugh Prather, Ph.D., Consultant Prather Consulting

Charter Schools: Advancing the Promise!!
2015 Annual Conference
Strategic Planning: Doing the Right Things

I. Welcome, Introductions, and Purpose for the Session
   Monica Aguilar and Hugh Prather
   Interactive and Your Questions Answered

II. GC Role/Executive Director Role in Strategic Planning for Charter Schools

III. Elements of a Strategic Planning Model for a Charter School from Two perspectives

VI. Closing Comments, Session Evaluation, Adjourn
Exemplary GC’s Focus on Leadership not Management

Management is doing things right; leadership is doing the right things.

(Peter Drucker)
Unique Nature of a Charter

• Governing GC Members are:
  – Trustees for student learning
  – Trustees for financial accountability
  – Members of a GC-not the GC
  – As a GC, the supervisor of the Executive Director

• Governing GC Members are not:
  – Managers
  – Administrators
  – “The GC”
Why Plan Strategically?

• Keeps the GC and Executive Director focused on the right things--- “Management is doing things right; leadership is doing the right things. Peter Drucker

• Incorporates all current planning initiatives--- “If you don't know where you are going, any plan will do.” Peter Drucker

• You are acting strategically when you plan for a desired future--- “Someone's sitting in the shade today because someone planted a tree a long time ago.” Warren Buffett
Are You Planning Strategically or Tactically?

**Tactical Planning**
- Day to Day
- Annual Cycle
- Today’s Challenges
- Present Oriented
- Doing Things Right
- Internal Focus

**Strategic Planning**
- Long Term-3-5 Years
- Toward a Desired Vision
- Tomorrow’s Opportunities
- Future Oriented
- Doing the Right Things
- Internal and External Focus
Power of Strategic Planning and Identifying Strategic Issues

• Provides strategic focus on the most important issues (the “Right” things)
• The “gap” produces creative tension
• Demonstrates accountability by the GC to stakeholders
• Provides direction for Executive Director
• Provides a basis for Executive Director accountability
• Provides alignment for the entire staff
What’s Involved for a GC to Plan Strategically? (Google John Bryson)

• Plan to Plan
• Validate Mission and Vision
• Review Mandates
• Conduct an environmental assessment (SWOT)
• Identify the strategic issues facing the district
• Develop a set of SMART objectives to address the strategic issues
• Monitor, adjust and modify (PDSA) as the plan is implemented
What’s Involved for a GC to Plan Strategically? (Google Brian Carpenter)

- Figure OUT
- Find OUT
- Scope OUT
- Write OUT
- Carry OUT
- Measure OUT
- Shout OUT
What’s Involved for a GC to Plan Strategically?

Bryson Model

• Plan to Plan
• Validate Mission and Vision
• Review Mandates
• Conduct an environmental assessment (SWOT)
• Identify the strategic issues facing the district
• Develop a set of SMART objectives to address the strategic issues
• Monitor, adjust and modify (PDSA) as the plan is implemented

Carpenter Model

• Figure OUT
• Find OUT
• Scope OUT
• Write OUT
• Carry OUT
• Measure OUT
• Shout OUT
The Strategic Planning Cycle (adapted from John Bryson)

1. Plan to Plan
2. Identify Strategic Issues
3. Conduct Environmental Scan (SWOT)
4. Validate Mission and Vision Review Mandates
5. Develop SMART Objectives to Address Strategic Issues
6. Monitor, Assess, and Report Progress
Form of the Plan
(4 K’s)

• Keep it simple
• Keep it short
• Keep it on the table
• Keep it updated

(Sample in Word of what Nuestros Valores is developing-available upon request as template)
Strategic Planning: Doing the Right Things

Monica Aguilar, Executive Director, Nuestros Valores Charter School
monica@nvcharter.com

Hugh Prather, Ph.D., Consultant
Prather Consulting
hugh.h.prather@gmail.com