

## Realizing Your Vision – the Strategic Plan

Principals and Pastors: as leaders, what are your dreams for your school? What would the school look like if it were perfectly fulfilling its mission? What would your school become if you had an unlimited budget? Are you planning from a position of strength or weakness? What is your vision of success? A strategic plan can help you realize your vision.

*The Catholic parochial school* is a unique institution and should have a formula for strategic planning that reflects its unique qualities. **What sets a parochial school apart from other private schools has to do with:**

- *The school's relationship to the Church and its parish;*
- *The values and guiding principles of the school;*
- *Leadership; and*
- *The needs of ALL students and families served by the school.*

**To be truly meaningful and useful, the plan should produce the following results:**

- *Coalesce leadership;*
- *Grow a culture of open communication, philanthropy and stewardship;*
- *Ensure the school meets the needs of the people it serves;*
- *Celebrate guiding principles and values;*
- *Lead to excellence, and*
- ***Lead to action.***

**To start the process, some questions a school may have are:**

1. What is strategic planning?
2. What are the steps in the planning process?
3. Who is responsible for initiating the planning process?
4. How do you begin the process?



5. What contextual and internal elements need to be addressed?
6. How does the committee develop the plan?
7. What goes into the draft and refinement of the plan?
8. Who carries out the implementation of the plan?
9. How is the plan updated?

## 1. What is strategic planning?

The strategic planning process doesn't begin until the vision is in place. The vision answers the question "Where do we want to be \_\_\_\_ years from now?" If we are perfectly fulfilling our mission, what would we look like?" To start, we ask "Where are we now?" To answer, we contemplate "How will we get there? Who will lead us? How much will it cost?"

Planning is a process of assigning the school's resources – people and money - to achieve the school's vision and mission. This is achieved by defining strategic objectives and action steps.

### **A few words of wisdom about strategic planning:**

- Many plans include new or updated space as a prime objective. Remember, what goes on inside the walls is just as important, if not more, than the walls themselves.
- Define your non-negotiables. For example, it is non-negotiable that we will ever become anything other than a Catholic school. It is non-negotiable that our core values will always reflect the gospel values.
- Incorporate wisdom into the plan. Wisdom-based plans are living documents that can change and adapt to current and future needs. Creativity and problem-solving should be allowed for in strategic planning.
- Don't be afraid of change. All God's creative work is accomplished through change.
- Anticipate some creative tension and listen with open hearts and minds.
- Integrate prayer into the process.
- Roll up your sleeves, get to work and work hard!



## 2. What are the steps in the planning process?

There are six phases or steps in the planning process:

- Initiating the planning process
- Considering internal and external elements to be assessed
- Developing the strategic plan
- Drafting and refining the plan
- Designing and carrying out the implementation strategies
- Updating the plan on an annual basis

## 3. Who is responsible for initiating the planning process?

As a collaborative leadership group, the pastor, principal, and school board decide to initiate the planning process and determine their individual roles. From this point, a decision is made to create a strategic planning committee.

Leadership should ensure the committee includes representation of all constituents: parents, teachers, administration, volunteers, school board, parish leadership, etc., and should determine who will chair the planning committee, or if a chair is needed at all.

Once the commitment to do the planning is made, the committee decides what long-range means—three years? five years? longer?

## 4. How do you begin the process?

Once the decision is made to do the planning, then—

- Determine if a consultant is needed or desirable. Even if consultants are not in the budget, the consultant interview process is a powerful learning experience for the committee.
- Consider what expenses might be involved in doing the planning – NEVER let financial reasons keep you from having a strategic plan. Fundraising can always pave the way for these finances.



- Decide on the size of the planning committee and what constituencies should be represented. Leave no stone unturned here.
- Suggest names of potential committee members – invite energetic, involved and collaborative personalities. It is human nature to include those who tell us everything is good, but try to invite those who will challenge your group to grow and evolve. Make sure committee members can commit to support fundraising activities so you can achieve 100% participation (the smallest of gifts will contribute to 100% participation.)
- Construct a timetable and calendar of meetings.
- Determine where meetings will be held.
- Determine what background material (e.g., mission statement and philosophy of the school, assessment and interview data, financial and enrollment data, trends in curriculum) is needed prior to the study and who will prepare it.

## **5. What internal and external elements to be assessed?**

The strategic long-range planning committee—

- Conducts an assessment survey of all constituents as a gauge to answer the question “Where are we now?” and presents the data to the group.
- Reviews the history of the school, its current situation, and its role in the community;
- Reviews the mission and philosophy of the school and decides if they are clear or need to be changed;
- Defines the guiding principles or core values of the school;
- Collaborates to define a vision statement (which answers the question “Where do we want to be in ---- years?) upon which the strategic plan is based;
- Brainstorms external factors that may impinge upon or enhance the school
- Brainstorms internal issues the school may face;
- Determines obstacles to overcome - critical issues the school may face, based on external factors and internal issues.



## 6. How does the committee develop the plan?

Once the above issues have been addressed, the planning committee comes to a consensus and discerns a mission statement. The committee then prioritizes strategic goals that will achieve the new vision. Each area of school life (culture, leadership, communication, development, curriculum, staffing, building, enrollment, finances,) will have strategic objectives and actions steps to meet the objectives. Finally, the committee determines the format for the plan and commissions a writing team to draft preliminary goals and action steps.

## 7. What goes into the draft and refinement of the plan?

Now the planning committee reviews the mission, vision, values and educational philosophy of the school in light of the proposed plan, decides how to review the plan and how to test the feasibility and desirability of the preferred scenario and goals with various stakeholders, edits and refines the draft of the plan, and presents it to the board for approval. It is certainly appropriate for the committee to celebrate and ritualize the conclusion of these phases of the work.

## 8. Who carries out the implementation of the plan?

The principal, in consultation with an appointed **change management committee** (preferably a board member, parent, and teacher representative):

- Plans the implementation program, including actions to be taken; who is responsible; beginning, completion, and reporting dates; and required resources.
- Incorporates into the annual budget funds to implement the plan.
- Includes implementation of the program in the principal's and board's yearly goals.
- Monitors the progress of the plan through reports to the board at regular intervals.
- Adjusts the implementation program, as necessary.



## **9. How is the plan updated?**

The principal, with appropriate groups, including the school board:

- Reviews external factors, internal issues, and critical issues
- Reviews strategic priorities
- Revises the plan and implementation program, based on new information
- Includes revisions in the coming year's operational planning

