

ADVISORY

10 PRACTICES A WISE BOARD FOLLOWS WHEN PLANNING STRATEGICALLY

by Christina Drouin

1. **Plan continuously.** Adopt a three-to-five year cycle of planning. A five-year cycle includes up to one year of planning and three to four years of implementation based on annual prioritization of strategic initiatives, evaluation of outcomes, and strategic relevancy. A board should set the expectation that the school always is working in one of three areas of this cycle: creating the plan, implementing the plan, or closing the plan. There should be no time that a school is without a plan, so the final year of a five-year plan typically overlaps starting the next plan.
2. **Transition from the previous plan.** When engaging in a new strategic planning process, make certain that the previous strategic plan is effectively 'closed out' by identifying and celebrating its successes and accounting for what may not have been accomplished.
3. **Set a solid foundation.** Work with the head to establish clear planning parameters including: what will be the planning horizon; how long the school will take to complete the planning process; what will be the process and timeline with milestone markers; what are the expectations of outcomes and outputs; who will comprise the planning committee; and whether or not an outside

facilitator will be used. Before beginning a process, benchmark and be aware of best practices in educational strategic planning. Support the head of school in implementing them at your institution.

4. **Begin with the end in mind.** One of the

10 Best Practices

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5. Turn the mirror outward.
6. Be bold.
7. Approve the plan and do your part to make it successful.
8. Make sure the plan is actionable and gets off to a good start.
9. Make strategic thinking central to board work.
10. Communicate thoroughly and often.

most reliable ways to ensure an actionable strategic plan is to involve those who will be doing the work in its planning. Allow the



head of school the time to develop a comprehensive plan using an inclusive process that engages a broad range of constituencies. To do this right can take up to a full academic year. Be part of the planning process, but do not dominate it. Encourage the head of school to assemble an interdisciplinary group to serve as a project management team.

5. **Turn the mirror outward to spot strategic issues.** A strategic plan is all about environmental context and relevant change. Make certain that your school's planning process incorporates a robust research plan that emphasizes external as well as internal data collection and analysis to determine strategic issues. Find and focus on the external factors that most dramatically impact the school's future. Develop a strategic agenda that focuses on taking advantage opportunities and overcoming threats present or anticipated in the external environment.
6. **Be bold.** Fly at 30,000 feet, dream big, and challenge the institution to stretch.
7. **Approve the plan and do your part to make it successful.** A strategic plan sets direction for the period of time it describes. Since setting institutional direction is a board function, the board must approve the vision and goals of the plan, as well as the performance measures that signal its success.

Name and claim the board's piece of the pie and set annual board goals based on the plan. Support the plan financially by developing a companion five-year financial plan to fund the advancement of its initiatives. Evaluate the plan by setting clear expectations of performance at the point of launch and support the head's leadership role in implementation.

8. **Make sure the plan is actionable and gets off to a good start.** Ask the head of school for an implementation plan before the strategic plan is launched in the community. Give the head early direction on priorities by identifying one or two major focal areas that are most important for the board to see results during the first year. Support the head in implementation.
9. **Make strategic thinking central to board work.** Use the strategic plan as a framework for strategic thinking and a driver of the board's agenda. Check the plan's continued relevancy by regularly testing its underlying assumptions. Devise a set of dashboard indicators that signal degrees of significant change in key areas of relevancy. Be prepared to recalibrate.
10. **Communicate thoroughly and often.** Be ambassadors of the plan, its vision and its progress. Stay informed. Ask questions. Celebrate successes.

