

ADVISORY

10 PITFALLS A WISE BOARD AVOIDS WHEN PLANNING STRATEGICALLY

by Christina Drouin

1. **Identity crisis.** Do not change the school's values and mission with each new strategic plan. While vision, goals, strategies and initiatives are open for change with each new plan, the school's values and mission remain constant.
2. **The Quick Fix.** Do not rush the planning process. Allow the head of school up to a year to manage the process, or risk losing the all-important buy-in of the professional staff. The length of time required to plan varies depending on the type and size of school, where it is in its life cycle, and the urgency and scope of its issues. If there is a pressing 'fix-the-ship' issue, treat it immediately and strategically.
3. **Top down strategic planning.** Do not fail to be inclusive. Engage a broad range of constituencies to gather and analyze the issues, and decide on and identify future work. The surest way to a plan that sits on the shelf is over-involving trustees while under-involving faculty, staff, and administration.
4. **Over-delivery on internal assessment and under-delivery on external environmental scanning.** Do not settle for research limited to current constituencies or stakeholders.

Through self-studies and re-accreditation processes, schools have become very skillful in turning the mirror inward to assess strengths and weaknesses, but typically are

10 Pitfalls to Avoid

1. Identity crisis
2. The quick fix
3. Top down strategic planning
4. Over-delivery on internal assessment and under-delivery on external environmental scanning
5. Issue creep
6. Transference
7. Settling
8. Death by budget
9. Strategic planning as episodic
10. Plan atrophy

not as experienced in reflecting on the external issues beyond their control. Internal strengths and weaknesses are relevant to a strategic agenda only when they connect to opportunities and threats in the external environment. Often schools fail to make this critical connection. Proper identification of strategic issues requires a balance of internal and external research. Insist that the research



- phase of the school's strategic planning process takes into account STEEP (Social, Technological, Environmental, Economic, and Political) Factors. Only by evaluating the Steep Factors' relevance to the school's future sustainability will the board engage in true strategic planning.
5. **Issue creep.** Do not try to address more than three to five critical issues in each three-to-five year strategic plan period. A disciplined approach to prioritization results in a sonar-like focus on those issues that are key and core to the delivery of the school's mission and core competencies.
 6. **Transference.** Do not transfer total responsibility for the plan's performance to the head of school because the administration has the lion's share of the implementation work. Thinking and planning strategically is one of the board's most important responsibilities. Within the framework of each strategic plan, the board has its own work and sharing responsibility for plan implementation is a more productive approach.
 7. **Settling.** Do not compromise on vision. A lukewarm vision never inspires action, confidence, or performance.
 8. **Death by budget.** Do not allow budget to drive vision. This is the surest way to kill a plan. First trumpet the vision. Then listen for resonance.
 9. **Strategic planning as episodic.** Do not view the planning process as a one-time exercise or weekend retreat. Instead set an expectation of the strategic plan as a framework for ongoing strategic thinking.
 10. **Plan atrophy.** Do not be afraid to change direction if the plan's underlying assumptions are no longer valid. The purpose of strategy is to create the conditions necessary for sustainability. The plan is intended to guide the school to its preferred future, *all things being equal*. External environmental changes that disrupt equilibrium must be accounted for. Both board and school must be nimble, flexible, and savvy enough to recalibrate when necessary.

