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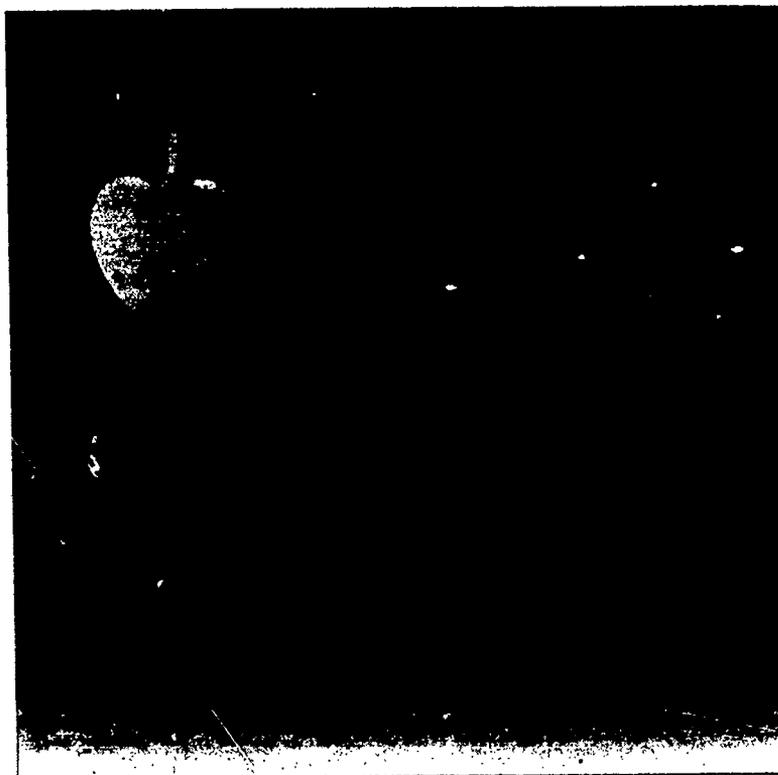
ABSTRACT

Over the past decade, there have been many calls for fundamental change in public education including a less hierarchical leadership structure and decentralized decision-making. While many plans provide goals for education reform, they do not provide a plan for achieving these goals. This guide offers school districts help in using strategic planning to achieve their educational goals. Strategic planning can facilitate communication among education stakeholders and guide change. The first section of this guide contains an introduction. The second section contains 19 key steps in the strategic-planning process that school districts can go through to prepare for, plan, and initiate change. Included are a further explanation of each key step and an estimated time frame for carrying it out. The third section contains strategic-planning terms and sample materials. Included are a comparison of strategic planning versus long-range planning, an agenda for a planning session, belief statements, three sample school district strategic plans, student-outcome objectives, strategies and work sheet, action-plan worksheet, a sample action plan and cost-benefit analysis, and a cost-projection worksheet. (Contains 20 references.) (JPT)

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Planning for Change

A Source Book for Strategic Planning



Prepared by the Strategic Planning Roundtable
New Hampshire LEADership Center
University of New Hampshire

February 1993

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INTRODUCTION

Over the last decade, scores of reports have called for fundamental changes in public education. Almost all insist that serious school reform is essential for the United States and its people to successfully compete and enjoy the wonders of the Twenty-first Century. The New Hampshire Education Think Tank in May 1992 concluded: "Schools must be transformed to meet the needs of a technology-driven information society, producing citizens who can analyze information, synthesize it, evaluate its worth, and extrapolate its meaning. Schools must teach, or at least help teach, such values as responsibility, self-esteem, self-management, and integrity. And they must provide an education that will allow United States workers to compete in a global economy where more than 80 percent of the jobs will soon require skilled labor."

These reports—published not only by education groups, but also by business, government, and civic organizations—recommend that school systems develop a less hierarchical structure of leadership and use decentralized decision-making. They suggest broadening traditional school parameters to include services for preschoolers, the elderly, and working adults; to create stronger links with local businesses and community agencies; and to involve parents and other community members more deeply in school activities.

The reports are often highly prescriptive with detailed recommendations on what the ideal classroom, school, and graduate should look like. But most skirt over the issue of how to get there, how to systematically achieve such dramatic changes. The Strategic Planning Roundtable's mission was to investigate how school reform can be achieved through strategic planning.

Efforts Have Begun

In many New Hampshire communities efforts to change public education have begun. For example, 43 New Hampshire schools are working with the New Hampshire School Improvement Program. Others are investigating "total quality management" as an improvement process. Some are applying technology to solve problems, and still others are using strategic planning to develop plans for comprehensive district reform.

The 15-member Strategic Planning Roundtable was organized by the New Hampshire LEADership Center in 1991 to investigate the methods and uses of strategic planning to achieve school reform. The Roundtable met seven times during the 1991-92 school year. Members reviewed recent literature on planning including Dr. Daniel Keck's (1990) description of strategic planning and his review of two national strategic planning models – the Association for Supervision and Curriculum Development and the American Association of School Administrators. Further, the Roundtable interviewed school people using strategic planning and had in-depth discussions regarding the advantages and disadvantages of this approach on school reform.



The Roundtable defined strategic planning as a series of planned steps to move a school district from its current state to a desired future state. The Roundtable concluded that strategic planning can be a useful process for initiating school improvement. This process is especially strong in providing an arena for communication among various stakeholders in schools—teachers, parents, administrators, community members, and business representatives. Further, it is a successful process for designing and securing broad-based support for a school vision, mission, objectives, and action steps, and for basing those plans on the values and realities of the community.

Caveats and Cautions

However, there are caveats and cautions, potential pitfalls and problems, with many of the models of strategic planning the Roundtable studied.

- (1) An essential pre-condition for systemic reform, overlooked in many strategic planning models, is the need for a widely held belief that change is needed.
- (2) Most models skirt the need for group-process training, suggesting instead a trained facilitator be responsible for keeping the group productive and democratic.
- (3) Goals established through strategic planning may become fixed, hampering the flexibility schools of the future will need to be responsive to changing educational demands.
- (4) A local strategic planning committee runs the risk of simply replacing the old bureaucratic system with another top-down organization.
- (5) Some models fail to highlight the importance of establishing a clear vision prior to developing objectives for action.
- (6) A clear focus on the primary goal of improving student learning can easily be lost amidst the sheer volume of data most traditional strategic planning models insist be examined.
- (7) Although quality and continual improvement are implicit in strategic planning models, few examined by the Roundtable showed an explicit connection between the planning process and "total quality management."
- (8) Strategic planning models tend to be weak in provisions for evaluating the implementation of plans and monitoring expected student outcomes.



Advice from the Roundtable

The Strategic Planning Roundtable hopes these guidelines and the accompanying support material and bibliography provide assistance in beginning the process of change and improvements in additional schools. However, no guidelines can possibly provide all the answers to fit all the circumstances of each school district or community. Perhaps the most important guideline the Roundtable can offer is not to wait until every contingency is considered, every question answered, before acting. Embark on a strategic planning process; make a commitment to seeing it through to its implementation; and keep in mind throughout the process that the ultimate purpose is to improve student learning.



KEY STEPS IN THE STRATEGIC PLANNING PROCESS

This is a listing of the steps a school district can go through to prepare for, plan, and initiate change. Each step is more fully discussed on the pages immediately following. Each district should emphasize those steps that respond to the needs of its community.

Key Steps	Time Frame
1. PRECONDITIONS FOR CREATING SYSTEMIC CHANGE IN SCHOOLS	Up to one full year
a. Review of present condition of education and future demands	
b. Review of the strategic planning process	
School board	
School administrators	
Union representatives	
Teachers	
Community members	
Parents	
Students	
c. School board approval	
2. DATA COLLECTION (Concurrent with Step 3 & 10)	Two months
a. Student data	
b. School data	
c. District data	
d. Community data	
3. STEERING COMMITTEE SELECTION (Concurrent with Step 2 & 10)	Two months
a. Opportunities to volunteer	
b. Reflection of cross section of the community	
4. ORIENTATION OF STEERING COMMITTEE	One day
a. Group process training	
b. Discussion of trends influencing schools of the future	
c. Develop an ideal school vision	
5. PLANNING SESSION	Three weeks
a. Mailing data book to the steering committee	(3 weeks prior to meeting)
b. Meeting with the steering committee to review data (preparation for the planning session)	(1 day)
c. Planning session (transition from analysis of data to development of statements of beliefs, mission, objectives)	(1 or 2 days)



- | | |
|--|---|
| 6. PUBLIC AND STAFF REVIEW OF STEERING COMMITTEE WORK | One month |
| 7. STEERING COMMITTEE FEEDBACK | Immediately following public reviews (one day or less) |
| 8. SCHOOL BOARD APPROVAL | Immediately following steering committee approval |
| 9. WIDE DISTRIBUTION OF PLAN TO THE COMMUNITY AND SCHOOLS | Immediately after school board approval |
| 10. ACTION TEAMS AND THEIR CHAIRS SELECTED | Should be started at Step 2 and be completed by Step 10 |
| 11. EDUCATION OF ACTION TEAMS AND CHAIRS | Two weeks |
| a. Mail approved plan to action team members | |
| b. Chair training in group process skills, action plans, and cost projections | (1 day) |
| c. Orient action teams to the plan, time frames, and guidelines for their work | (1 day) |
| 12. ACTION TEAM WORK: REVIEW RESEARCH, VISIT EXEMPLARY SCHOOLS, DEVELOP ACTION PLANS, CONDUCT COST PROJECTIONS | Up to one full year |
| 13. ACTION TEAM WORK TO STEERING COMMITTEE FOR REVIEW | One or two days |
| a. Each action team presentation | |
| b. Decisions of steering committee | |
| 14. FINAL PLAN SENT TO SCHOOL BOARD FOR APPROVAL | Immediately following steering committee approval |
| 15. IMPLEMENT THE PLAN | Immediate and ongoing |
| 16. ACCOUNTABILITY | Ongoing |
| 17. MARKETING AND PUBLIC RELATIONS | Throughout the entire process |
| 18. MEASUREMENT AND EVALUATION | Ongoing, but summarized annually |
| 19. YEARLY UPDATE | Annually |



PRECONDITIONS FOR CREATING SYSTEMIC CHANGE IN SCHOOLS

STEP 1

(Even if this step takes a year or longer, it must be achieved for success to occur.)

- Secure superintendent commitment.
- Provide reading material and video tapes about the status of public education for the school board, staff, parents, community members, local business people.
- Provide reading materials or speakers about the future and new demands on schools—why we must change, the nature of the change process.
- Discuss the strategic planning process with the school board and school administrators.
- Secure school board commitment and approval, including commitment of the necessary resources to conduct strategic planning.
- Present information on strategic planning to school staffs, teacher unions, community members, local businesses, school board. Give them full opportunity to question the process. They should be given opportunities to make recommendations to enrich or amend the process. Use a variety of methods to communicate information—newsletters, news releases, radio, and television.
- Secure broad-based support and interest.
- Provide on-going information about why schools must change and what that change should look like.
- Do not underestimate the influence and generally conservative nature of the culture of schools. In 1990, P. C. Schlechty wrote:

Changing the structure of schools is no simple task. Social structures are embedded in systems of meaning, value, belief, and knowledge; such systems comprise the culture of an organization. To change an organization's structure, therefore, one must attend not only to rules, roles, and relationships but to systems of beliefs, values, and knowledge as well. Structural change requires cultural change. Too often, those who would change the structure of schools fail to appreciate the link between structure and culture.
- Examine the literature on change; build into your plans the critical features required to secure systematic, long-lasting, institutionalized change.



NOTE: At every stage of this activity, it is imperative for everyone to understand that the ultimate purpose of strategic planning is to improve student learning. Other purposes also are served, such as improved conditions for students and staff and greater community involvement in schools, but the quality of student learning must be the central concern.

DATA COLLECTION

STEP 2

The major purpose of a data summary is to provide a broad perspective for the steering committee. Schedule at least two months for collecting and formatting this information. Step 2 (Data Collection), Step 3 (Steering Committee Selection) and Step 10 (Action Teams and Their Chairs Selected) can begin simultaneously.

- Identify person(s) responsible for collecting this data.
- Prepare a well-organized data book containing relevant information such as:
 - Student performance data, i.e., test data, portfolios, description of projects, participation in co-curricular activities.
 - Student attendance, enrollment projections, dropout data, disciplinary actions.
 - School schedules, programs, curricula opportunities, number of students enrolled in specific subjects.
 - Student learning goals.
 - Role and job descriptions for teachers, principals, superintendent, school board.
 - Staff characteristics, attitudes, relationships, development opportunities, turnover rate.
 - Instructional practices, student evaluation systems, teacher scheduling and planning times.
 - District budget, adequacy of school facilities, and other related resource supports.
 - Community information, including tax and financial data, demographic trends, and other community resources.
 - Information on state and national educational goals and policy proposals.



Some school districts choose to narrow the parameters of their data gathering. For instance, the Bedford, NH, School District stated at the beginning of its strategic planning process that the primary focus for initial data collection and analysis would be on what students know and can do in comparison to what students are expected to know and do. Other types of data will be used at a later time to plan intervention to narrow the gap between expected and existing student outcomes.

STEERING COMMITTEE SELECTION

STEP 3

(At least two months)

(Steps 2, 3 and 10 can begin simultaneously.)

- It is especially important to publish invitations widely. Provide opportunities for various stakeholders to volunteer to participate. (Talk it up in schools, newspapers, community meetings; leave invitations in grocery stores, businesses, local clubs, etc.)
- Create a matrix to help select a balanced set of not more than 30 representatives—roughly 50% from community and 50% from school system. This broad-based group should include leaders representing different points of view, grade levels, schools, jobs, (teachers, administrators, union representatives, and students when appropriate). Also include people associated with schools such as parents, school board members, business and community leaders.
(Sample Matrix, page 23)
- Select a team at least one month ahead of initial steering committee activity.
- Keep the school board current regarding steering committee selection and other activities associated with the planning process.

ORIENTATION OF STEERING COMMITTEE

STEP 4

(One day)

Group Process Training

- Provide a half-day training session.
- Ask consultant from outside the school district to assist with the process.
- Conduct team-building activities that help the team members meet each other.



- Provide a session for committee members to review group process and consensus-building skills, considering the following characteristics of an effective group meeting:
 - Start on time
 - End on time
 - Have an agenda
 - Prepare and distribute decisions of the group within 48 hours or use computer to provide immediate copies of decisions
 - Use flip chart or board to record comments and suggestions
 - Sit in a circle to facilitate person-to-person talk
 - Have name tags
 - Insist on one person talking at a time
 - Have all comments acceptable, no put-downs, no side conversations
 - Clarify norms and goals for the planning meeting

- Emphasize the following skills and norms that make groups effective:
 - Clear communication among members
 - Addressing and seeking resolution to conflict
 - Commitment to the task
 - Adoption and agreement on the decision-making process to be used (consensus recommended)
 - No hidden agenda (from any source)
 - Participation by everyone

- Special attention should be given to developing an understanding of the change process and to those factors which either facilitate or inhibit change in individuals and organizations such as:
 - Relevance: Is the change practical and does it meet perceived needs?
 - Readiness: Does the school or district have the capacity to change? Do the participants possess the requisite knowledge and skills necessary to make the change?
 - Resources: Are adequate equipment, materials and supplies available? Is there enough time?

Orientation Phase

- Provide a half day training session to explain why school change matters and provide some visions of what that change should entail.

- Present a stimulating, comprehensive analysis of the major trends impacting schools now and in the future, including, but not limited to:
 - Demographics (ethnic groups, urban society, longevity, etc.)
 - Social patterns (single-parent family, homeless persons, etc.)



- Job opportunities and requirements (role of technology, etc.)
 - Emergence of post-industrial society
 - Nature of global village and economy
 - New approaches to delivering instruction in schools
 - National goals for public education
 - Various proposals regarding new educational policies
- Establish an ideal school vision.

PLANNING SESSION

STEP 5

(Three weeks)

- Distribute the data book to all steering committee members for their review.
- Hold the meeting in one of these suggested places: vocational technology center, library of school, town hall, local hotel. (Can even raise money privately, if necessary, to pay for a desirable meeting location.)
- Develop an agenda for the planning session. (Sample planning session agenda, pages 24 and 25.)
- Use a facilitator from outside the school district to allow full participation of all local people. However, designate a school district employee to coordinate the entire strategic planning process.
- First review the data book and ideal school vision statements. This activity is devoted primarily to sharing and comprehending information contained in the data book. As an analysis of this data is undertaken, a transition into actual planning will follow quite naturally.
- Encourage the steering committee to hold in mind all data reviewed earlier as they design a plan for the school district.
- Second, establish a set of belief statements. (Sample belief statements, pages 26, 27, 30, 31.)
- Third, create a mission statement. (Sample mission statements, pages 27, 30, 31.)
- Establish three to five objectives that will achieve the mission and vision and remain consistent with the beliefs. (Sample objectives, pages 27, 28, 30, 32, 33.)



- Although strategies may be suggested and discussed during this session, make final selection of specific strategies the responsibility of the action teams, the next step in strategic planning.
- Connect a computer to an overhead projector for group writing and distribute a printed document by the end of the meeting for each participant.

(Samples of strategic plans developed in New Hampshire school districts, pages 27-32.)

PUBLIC AND STAFF REVIEW OF STEERING COMMITTEE WORK

STEP 6

(One month)

- Arrange meetings with school personnel and with community groups to present the initial draft of the strategic plan.
- Provide ample opportunity for discussion, clarification, reaction, and (most important) suggestions for improving the plan.
- Insure that the superintendent is at each of these review meetings.
- Have two or more members of the steering committee (in addition to the superintendent) at these meetings or have the entire steering committee participate in this step.
- Designate a steering committee member to take notes and prepare a summary of the questions, concerns, and suggestions that surface during each meeting.
- Solicit volunteers to join action teams.

STEERING COMMITTEE FEEDBACK

STEP 7

(Immediately following public reviews)

- Take feedback to the steering committee for its review and revision. This should take one day or less.



SCHOOL BOARD APPROVAL

STEP 8

(Immediately following steering committee approval)

- Submit the final strategic plan to the school board for approval. (Sample strategic plans, pages 27-32.)

WIDE DISTRIBUTION OF PLAN TO THE COMMUNITY AND SCHOOLS

STEP 9

(Immediately after school board approval)

- Use handout flyers, newspapers, radio, television, community groups, newsletter to share plan with the community.

ACTION TEAMS AND THEIR CHAIRS SELECTED

STEP 10

(Should be started at Step 2 and be completed by Step 10)

- Set up action teams on a building level basis, on the basis of district-wide objectives or strategies, or in some other pattern that responds best to the thrust of the strategic plan or to local circumstances.
- Select action team members so various stakeholder groups will be represented.
- Consider people who volunteered for the steering committee but were not selected.
- Designate chair(s) for each action team.

EDUCATION OF ACTION TEAMS AND CHAIRS

STEP 11

(Two weeks)

- Mail approved plan to action team members (10-14 members).
- Provide one-day training session for chairs in group process skills, action plan development, and cost projections.



- Have action team chairs responsible for ensuring:
 - Data from the data book and other sources specific to the action team task are reviewed by all action team members
 - Participation of all action team members is encouraged
 - Consensus is understood and used for decision-making
 - Time lines are established and used
 - Decisions are made
- Orient action teams (one day) to the strategic plan and to guidelines for its work, including group process skills, action plan development and cost projections.
- Explore the rationale underlying the strategic plan.
- Review strategic plan to identify areas requiring action.
- Schedule regular meetings of all action team chairs to monitor progress and to assure coordination of action team plans.

ACTION TEAM WORK

STEP 12

(Up to one full year)

- Brainstorm strategies to implement the strategic plan objective(s).
- Review relevant educational research and visit exemplary schools.
- Establish one or more strategies to achieve the objective. (Sample strategies, pages 28, 29, 34 and strategy worksheet, page 35.)
- Develop action plans for each strategy. (Sample action plan worksheet, page 36 and sample action plans, pages 37, 38, 39.)
- Desirable characteristics of a good action plan:
 - Specific reference to the strategy and objective it supports
 - A detailed description of each step required to accomplish the plan
 - An indication of assignments and responsibilities
 - A time line for the plan
 - A cost projection
 - An evaluation design



- Consider questions asked by the New Hampshire School Improvement Program about action plans:
 - How will this proposed action/task have an **impact** on student outcomes? Will it truly affect the experience of our students?
 - Is this proposed action/task vital to achieving our **goal**— or is it just a **good idea**? How will it create real progress?
 - How will this proposed action/task **gain the commitment** of necessary **constituent groups** who will play a part in its implementation? Is it clear **who will be involved** in the implementation?
 - How does this proposed action/task address **systemic change**? Why is it worthy of our time and energy?
 - To what extent is this proposed action/task **realistic** and “do-able?”
- Prepare a cost projection for each action plan. (Sample cost projections and worksheet, pages 40-41.)
- Specify the evaluation process that will be used to determine if the work has been accomplished and the desired results achieved.

ACTION TEAM WORK TO STEERING COMMITTEE FOR REVIEW

STEP 13

(One or two days)

- Have each action team, or a representative of the team, present work to the steering committee for 20 minutes, followed by questions. Not to exceed one hour total.
- If necessary, have the action team prepare a revised action plan. Ultimately, the action plan must be mutually acceptable to both the action team and the steering committee.
- Cost projections are carefully reviewed by the superintendent, business administrator, and other appropriate people to correspond to district resources.

FINAL PLAN SENT TO BOARD FOR APPROVAL

STEP 14

(Immediately following steering committee approval)

- Send the final action plans with cost projections described to the school board for timely approval.



- Have it understood that school board approval of the action plans includes clear designation of the individual(s) charged with completing the proposed action(s), approval of policies and resources required to achieve the plan, and a board commitment to make decisions based on the priorities of the plan.

IMPLEMENT THE PLAN

STEP 15

(Immediate and ongoing)

- Have the individuals or groups specified in the action plan move promptly in coordination with the budget cycle to implement the specific actions previously identified.
- Have appropriate support and resources (previously identified in the cost projections) provided by the school board or some other source within the community.
- Because implementation of action plans will involve change, consider the usual characteristics of the change process including:
 - Conflict and disagreement are not only inevitable but often fundamental to successful change.
 - Persistence is a critical attribute in bringing about change.
 - Central office administrators must give not only verbal support to the process, but must demonstrate through actions that the process is important and should be taken seriously.
 - Change typically involves some form of loss for the individuals involved. Therefore, be prepared to provide support for people throughout the process.
 - "Change is not a fully predictable process. The answer is found not by seeking ready-made guidelines, but by struggling to understand and modify events and processes that are intrinsically complicated, difficult to pin down, and ever changing." (Fullan & Stiegelbauer, 1991)

ACCOUNTABILITY

STEP 16

(On-going)

- For each objective, have the action team or another designated individual or group identify one or more measurable outcomes that signify accomplishment of the objective.



- Collect baseline data regarding the level of attainment of each objective. This should be collected prior to implementing actions. (In many cases, appropriate baseline data will be available because of earlier work done by the strategic planning team.)
- Write accountability report(s) and widely disseminate within the community. Document in a “before and after” report on the progress made toward achievement of the intended improvements.

MARKETING AND PUBLIC RELATIONS

STEP 17

(Throughout the entire process)

- Make newsletters and other reports the responsibility of the steering committee (district level) and the action teams (when the focus is on a particular school level or on a particular objective).
- Encourage reports on progress in attaining desired outcomes as a very important vehicle for sustaining public interest and involvement.
- Coordinate all aspects of the public information program to avoid mixed messages, redundancy, contradictions, and similar problems. It may be desirable to identify one individual or unit to be responsible for such coordination.

MEASUREMENT AND EVALUATION

STEP 18

(Ongoing but summarized annually)

- Consider as many indicators as possible that identify the level of success achieved by strategic planning.
- Consider both formative evaluation (how well was the work of strategic planning conducted?) and summative evaluation (to what extent were the objectives actually achieved?).
 - Formative evaluation can involve pencil-and-paper ratings of the effectiveness, interviews to ascertain levels of understanding and satisfaction, and less direct measures such as content analysis of news stories, letters to the editor, or citizen comments at school board meetings.



- Summative evaluation will tend to be "criterion referenced"; that is, the objectives identified in the strategic plan will be stated in terms of measurable outcomes. The evaluation will simply report the extent to which each measurable outcome actually was attained.

CAUTION Avoid simplistic measurements of complex outcomes. Used without other indicators, a score on a typical standardized test of reading will not be an adequate measure of improved reading skills. For example, a more complete (portfolio) approach might report on changes in reading taste, out-of-school reading habits, and frequency of use of library materials.

YEARLY UPDATE

STEP 19

(Annually)

- Continuously monitor the implementation of the strategic plan and its subsidiary components, the various action plans. This is essential and is the responsibility of the group most directly involved with a particular action.
- Consolidate the results of the monitoring to provide an end-of-the-year update. This is the responsibility of the superintendent, the principal, the school board, the steering committee, and, in some cases, the action teams.
- Have the steering committee review the end-of-the year summary data, and examine changes in the database assembled at the start of the strategic planning effort.
- Based on the results of these reviews, the strategic planning team should update the strategic plan to assure that it reflects changes in priorities and objectives and to put in motion any modifications in the action plan. It may be necessary to develop additional objectives and strategies, and to establish new action teams to deal with these. In short, this is a continuing replication of the original strategic planning process.



STRATEGIC PLANNING TERMS AND SAMPLE MATERIALS

STRATEGIC PLANNING TERMS

ACCOUNTABILITY	A summary judgment regarding the outcomes of the strategic plan
ACTION PLAN	A written document detailing the sequence of steps needed to reach specific objectives that make up a goal or "target" area; action plans also specify who will do what, when, and how the goal to be attained will be determined
ACTION TEAM	A broad-based group drawn from the community and school that develops the action steps for accomplishing the objective; the action team develops the action plans and cost projections for implementation by the professional staff
BELIEFS	Convictions or views held as ultimately important for the school system
CONSENSUS	A process of reaching decisions by mutual consent rather than by majority vote
COST PROJECTIONS	A description of the cost for implementing the plan
CULTURE	The social milieu of the organization including values, beliefs, and attitudes
FACILITATOR	An individual(s) assigned responsibility for organizing, administering, and orchestrating the planning process
GROUP PROCESS	A series of exercises led by a facilitator in order to help the group become a team
MEASUREMENT AND EVALUATION	Periodic review of changes against baseline data to determine whether objectives are being met
MISSION	A succinct statement that describes the purpose of the school system
OBJECTIVES	A series of statements that define in outcome terms what the organization will accomplish



PARADIGM	A schematic or model depicting the core features of a process or a school of thought
STRATEGIES	Methods to operationalizing the objectives
STUDENT OUTCOMES	All aspects of student behavior that are influenced by schooling, including citizenship, character, and values, as well as achievement in the traditional school subjects
PLANNING	The development and implementation of a series of planned steps that move an organization from its current state to a desired future state; this collaborative process should include: understanding forces that affect the organization, assessing the organization, defining values, developing a mission, agreeing to objectives and plans, implementing the plans, and reviewing and renewing the plans
STEERING COMMITTEE	A balanced group of representatives drawn from the community and school district, should include different points of view, different grade levels, different schools, parents, students, and representatives of school board, business community, administration, union, as a planning team that oversees the development and implementation of the strategic plan
SYSTEMIC CHANGE	The social, cultural, and organizational transformation of a school system from its current state to its desired state through a planned process
VISION	The bridge between old and new paradigms; describes the organization in its ideal state.

(Prepared by the Merrimack School District and the Nashua School District Roundtable members, 1992)



STRATEGIC PLANNING VERSUS LONG-RANGE PLANNING

Long-range planning

Assumed a closed system within which organizational five- and ten-year blueprints could be constructed.

Focused on the final blueprint.

Its application of formulas assumed rationality but was inadequate, as it gave too little attention to values, politics, and changed circumstances.

Tended toward internal analysis, toward planning as a separate institutional function.

Made decisions about the future based on present data.

Emphasized the science of planning, management, and decision making.

Focused on organizational goals and objectives five years in the future.

Strategic planning

Assumes an open system in which organizations are dynamic and constantly changing as they integrate information from shifting environmental factors.

Focuses on the process.

Is rational because it incorporates the reality of the irrational.

Focuses on the external environment, on qualitative information and intuitive decisions regarding resource commitment, and on integrated, participatory involvement.

Uses current and future trends to make current, not future, decisions.

Emphasizes creativity, innovativeness of intuition—the art of planning, management, and decision making.

Asks what decision is appropriate today based on a projection of critical external variables five years from now.

(*Strategic Management in Education*, by Evelyn Pasteur Valentine, 1991)



SAMPLE

AGENDA FOR PLANNING SESSION

First Day

- 6:30 PM Examine Data Book
- 8:30 PM Review Ideal School Vision Statements
- 9:30 PM Adjourn

Second Day

- 9:00 AM Establish Belief Statements
- 10:45 AM Break
- 11:00 AM Begin Mission Statements
- 12:15 PM Lunch
- 12:45 PM Complete Mission Statements
- 3:00 PM Break
- 3:15 PM Begin Objectives
- 4:30 PM Break
- 4:45 PM Complete Objectives
- 6:00 PM Adjourn

(Provided by the Strategic Planning Roundtable, 1992)



SAMPLE

**AGENDA FOR PLANNING SESSION
ROCHESTER SCHOOL DEPARTMENT - INITIAL PLANNING SESSIONS**

Friday Night, May 31

- 6:30 PM Introductions and Overview of Strategic Planning
- 7:00 PM Begin Statements of Belief
- 10:00 PM Adjourn

Saturday, June 1

- 8:00 AM Complete Statements of Belief
- 9:30 AM Mission/Vision Statement
- 11:30 AM Begin Strategic Parameters
- 12:15 PM Lunch
- 12:45 PM Complete Strategic Parameters
- 2:00 PM Internal Analysis
- 4:45 PM Dinner
- 5:30 PM External Analysis
- 8:00 PM Adjourn

Saturday, June 8

- 8:00 AM Critical Issue Formulation
- 11:00 AM Begin Objectives
- 12:15 PM Lunch
- 1:00 PM Objectives
- 2:45 PM Break
- 3:00 PM Action Plans
- 5:00 PM Adjourn

Note: There will be periodic breaks each day. Additionally, participants may take individual breaks as needed.

(Provided by Rochester School District, Rochester, NH 1992. The Rochester School District used Strategic Planning for America's Schools, 1988 to guide their work)



SAMPLE

BELIEF STATEMENTS

Lifelong Growth and Learning

We believe that learning is a lifelong process of developing one's potential. We will set high expectations for learning, support the development of each individual, and demonstrate continuous growth as adult members of the educational community.

Diversity within Our Common Mission

We believe that uniqueness among students, employees, and school communities should be respected and honored. We will encourage diversity in our district, within the framework of our mission, to match the individual differences of those we serve.

Creativity and Initiative

We believe that love of learning, new ideas and self-improvement are essential to education and learning. We will support creative approaches, well-thought-out initiatives, and cooperative efforts toward higher levels of achievement.

Integrity and Ethical Behavior

We will behave with honesty and integrity, exercise forward-looking leadership, manage district resources responsibly, endeavor to communicate effectively, and demonstrate caring professionalism in our relationships.

Community Tradition

We honor the tradition of educational excellence in Littleton and the integral role public schools play in fostering a sense of community. We will uphold this heritage by inviting the involvement of students, employees, parents, and community in shaping the future of Littleton Public Schools.

Teamwork

We believe that education is a responsibility shared among students, parents, employees, and the community. We will work together as advocates for youth and learning to fulfill the Littleton Public Schools mission.

S7/17 (3/26/92)

(From the Littleton School District. Littleton, CO, 1992)



SAMPLE

ROCHESTER SCHOOL DEPARTMENT STRATEGIC PLAN ROCHESTER, NH 1990-91

Statements of Belief

We believe that:

- Opportunities should be provided for all students to achieve their maximum potential in all areas, including but not limited to academic, social, emotional, physical, and intellectual development.
- Schools need to support and enhance the ethical and moral values that are traditionally taught in the home.
- Education is a partnership that requires communication, commitment, and involvement of the entire community, including but not limited to parents, businesses, students, and school staff.
- Schools need to address the changing world in the use of technology, subjects taught, methods of teaching, and career options for students. Before implementation of innovations, however, careful evaluation of new techniques is necessary in order to avoid potentially damaging educational facts.
- The school and staff must provide a safe environment that addresses individual needs and is conducive to learning.
- The school district needs to provide a staff which exhibits high ethical, moral and professional standards. The school district and its individual staff members are accountable for these standards. Substandard performance has no place in public education.
- It is the school's responsibility to help prepare students to become contributing members of a competitive and complex society.
- Education is a lifelong learning process. Resources of the schools should be accessible to members of the entire community.

Mission Statement

As a vibrant and integral part of our community, the Mission of the Rochester School Department is to educate by:

- Providing a school climate that encourages all students to achieve their maximum potential and continue individual growth.
- Supporting and enhancing high ethical, moral and social values to prepare students to become positive, contributing members of a complex, competitive and ever changing society.
- Creating and maintaining a partnership involving a dedicated professional staff and all segments of the community.

Objectives

- (1) By September, 1992, a job description will have been written for every position in the district and an evaluation process developed which holds employees accountable for the elements of the job description.
- (2) By September, 1993, the district will have written and implemented a competency based curriculum, K-12.
- (3) By June, 1995, the number of Spaulding students going on to post-secondary education will meet or exceed the state average.
- (4) By June of 1992, the district will implement a working business and school program.



- (5) By June of 1993, the district will develop, implement and monitor a mechanism to determine what academic and occupational skills are necessary for success in college, employment and community life. These elements will be infused into the competency based curriculum.
- (6) Within the next two years, all teachers will have been involved with a cooperative program that will better prepare them to instruct students to become positive, contributing members of a complex, competitive and ever changing society.
- (7) By school year 1993-94, the district will enhance the current Parent Teacher Organizations and Parent Teacher Association and will have expanded them to the middle and high schools with membership records representing 10% of the total number of students in each school.
- (8) By September, 1992, the district will implement a quality communications program through all available media for the entire school system.

Strategies

Objective 1:

- The action team will develop job descriptions that will reflect the elements of our mission, beliefs and objectives.
- The action team will work with an action team in revising the evaluation procedure and format to reflect the elements of the job descriptions.

Objective 2:

- The action team will develop and implement a competency based curriculum, K-12.

Objective 3:

- All students, K-12, will be exposed to an aggressive career education program and the secondary guidance department will expand its program of career and college education for all students.

Objective 4:

- During the 1991-92 school year, establish three working business partnerships (i.e., adopt a school, loaned executive) between the school district and local business and industry.

Objective 5:

- Beginning in 1993, annually survey SHS graduates one year after graduation to determine if their educational, vocational and community life skills needs were met.
- Beginning in 1993, annually survey local employers (through the Seacoast Personnel Association and other avenues) to determine if their expectations of the necessary job entry skills are being met by SHS graduates and for suggestions for improvement.
- From these surveys, implement necessary academic and vocational changes.

Objective 6:

- By June, 1993, a formalized inservice program will be in place to help educate teachers on current business practices and needs.

Objective 7:

- The school administration, faculty and staffs of the middle school and high school will organize, support and operate a parent/teacher organization or association. The administration, faculty and staffs of the eight elementary schools will enhance their PTA/PTOs to meet the 10% membership criteria.

Objective 8:

- The action team will implement a communication system centered at the Central Office. Each building will send information to the contact person as determined by the planning team. The contact person will act as press secretary for the Rochester School Department.

Parameters beyond which we are unwilling to go

We will not

- Allow students to graduate who cannot read, write and do basic computation.
- Accept substandard performance from staff or students.
- Place more emphasis on athletics than education and academics.
- Condone activities which place undue mental or physical risk on students or staff.
- Tolerate vandalism or destruction of the physical plant.
- Accept rude behavior or disrespect from students or staff.
- Allow students to leave early to work except where required by statute or Department of Education regulations for educational programs.
- Allow any person or persons to disrupt the educational process.
- Allow students to drop out without an alternative process or fail to provide alternative programs for students at risk.

(The Rochester School District used Strategic Planning for America's Schools, 1988 to guide their work.)



SAMPLE

SOMERSWORTH SCHOOL DISTRICT STRATEGIC PLAN SOMERSWORTH, NH – 1990-91

BELIEFS

We believe that all children should feel welcome in our schools.

We believe that all children can learn.

We believe that learning is the purpose of schools.

We believe that education should help everyone reach full potential.

We believe that today's education shapes tomorrow's world.

We believe that students best succeed when the community, schools, parents, and students work together.

EXPECT EXCELLENCE

MISSION

The mission of the Somersworth School District is to inspire all students to excel, to develop a thirst for knowledge, and to teach the essential skills necessary to be caring, contributing and responsible individuals in an ever-changing world.

PARAMETERS

- (1) We will not institute any new program unless it is cost effective, provides adequate staff preparation and adequate funding, and describes an appropriate evaluation design.
- (2) We will not tolerate discrimination in any form.
- (3) We will organize strategically to accomplish our mission and systematically evaluate our programs in meeting stated objectives on an ongoing basis.
- (4) We will practice participatory management coupled with accountability.
- (5) Instructional programming will be accorded the highest priority.
- (6) We will not engage in any activity that demeans the worth of any individual.
- (7) We will not grant tenure (continuing contract) to certified staff members with anything less than a high level of performance and competence.
- (8) We will expect the same high standards from our staff, administrators and board members that we expect from our students.
- (9) We will not tolerate anyone who jeopardizes the safety of self or others.

OBJECTIVES

- (1) By December, 1992, student outcomes and a method of evaluation based on the district's mission and current research will be written for all programs and courses.
By December, 1993, there will be a written, integrated curriculum that will include the utilization of technology that will meet these outcomes.
- (2) By December, 1991, we will develop a comprehensive staff development plan, a timeline for its implementation and an evaluation process. The plan will include, but not be limited to, the following topics:
 - Participatory Management
 - Achievement and Evaluation of Student Outcomes
 - Effective Teaching Methodologies
 - Cooperative Learning
 - Research-Based Instruction
- (3) By September, 1992, we will develop a plan for community participation in educational decision making which will engage us in collaborative relationships with parents, business, community members and agencies.
- (4) By October, 1991, we will define and assess the current organizational structure of the Somersworth School District and use this information to redefine and develop an organizational structure which will meet the district's strategic needs.

(The Somersworth School District used Dr. Daniel Keck's Model, 1990 and Strategic Planning for America's Schools, 1988 to guide their work.)



SAMPLE

PORTSMOUTH SCHOOL DISTRICT STRATEGIC PLAN PORTSMOUTH, NH – 1990-91

MISSION STATEMENT

The purpose of the Portsmouth Schools is to educate all students by challenging them to become thinking, responsible, contributing citizens who continue to learn throughout their lives.

STATEMENTS OF BELIEFS

WE BELIEVE:

- the purpose of schools is learning.
- learning is natural and ongoing throughout one's life.
- people learn in different ways and at different rates.
- higher expectations produce higher results.
- it is essential to recognize the importance of cooperation, as well as competition, in our complex society.
- education is fundamental to the successful functioning of society and must be a top priority.
- education is the responsibility of the entire community.
- a partnership among students, teachers, parents, and all other community members and organizations is necessary to prepare our children for the future.
- our community is a classroom.
- our rapidly changing world demands an openness to new knowledge.
- children need to feel good about themselves.
- everyone is entitled to a safe, supportive, and secure learning environment.
- everyone has the right to be treated with dignity and respect.
- each student is entitled to an education which fosters the development of the individual's full potential.
- individuals are ultimately responsible for their actions and achievements.
- a child's education is our investment in the future.

STRATEGIC PARAMETERS

WE WILL NOT:

- give up on any child.
- tolerate any behavior that demeans the worth or dignity of any individual or disrupts the educational process.
- allow anything to take precedence over achievement of student outcomes.
- accept any behavior or practice that makes parents feel unwelcomed in their child's school.
- allow any student to be restricted in his or her quest for knowledge. We will guarantee equity in education.
- accept substandard performance of students or staff.
- implement any new program without a favorable cost/benefit analysis, staff preparation, and acceptable evaluation design.
- allow students to graduate who have not met the requirements of their educational programs.
- initiate policies or programs which endanger the environment.



STRATEGIC PLANNING OBJECTIVES

- By **December 1992**, the Portsmouth School District will develop student outcomes and methods of evaluating student competencies, which will enable all graduates to successfully function in the 21st century.

The outcomes to be developed for primary, intermediate, middle and high school levels will include, but not be limited to, the following skills:

Communication

Reading/Writing	World Studies/Foreign Languages/Cultures
Math/Science	Reading Images
Listening/Speaking	Arts
Technology	

Conceptualization

Memorization	Comprehension
Application	Synthesis
Analysis	Evaluation
Extrapolation	

Coping

Physical Well-Being	Social Well-Being
Emotional Well-Being	Team Work
Appreciation for Diversity	

- By **December 1993**, the Portsmouth School District will implement a plan to restructure curriculum/ programs, organizational structure, and instructional practice to make the most of learning time and promote interdisciplinary studies to enable all students to successfully attain the district's stated outcomes.
- By **July 1992**, the Portsmouth School District will design a plan to restructure the organizational system to accomplish our mission and objectives. The planning, restructuring, and resulting organizational system will involve parents, students, teachers, administrators, school board members, and the greater community in decision making.
- By **September 1996**, all staff will demonstrate competency in identified effective practices which are directly related to district-wide student outcomes. In order to achieve this, the time and money for staff development will be built into the 1992-96 budgets and calendars.
- By **September 1992**, the Portsmouth School District will initiate an on-going comprehensive staff evaluation system for all school personnel that will reflect the school district's objectives. This will be fully implemented by **July 1, 1993**.
- The Portsmouth School District will develop partnerships among students, parents, educators, and other community members.
- By **September 1992**, we will have established an Education Partnership Council and a comprehensive plan to implement the following:
 - community service learning opportunities for all students
 - a formal public relations program
 - mentorships/apprenticeships
 - community/business partnerships
 - on-going community responsibility for the educational process
- By **July 1993**, the Portsmouth School District will develop a plan to have 100% of the parents and community be aware of school programs and events, and to participate in a school function each year.
- By **December 1991**, all constituent groups will have an opportunity to gain awareness of the strategic planning process and results, and to give input to the belief statements, mission statement, parameters, and objectives.

(The Portsmouth School District used Dr. Daniel Keck's Model, 1990 and Strategic Planning for America's Schools, 1988 to guide their work.)



SAMPLE

STUDENT OUTCOME OBJECTIVES

The following outcomes are based on the Federal Way School District's commitment to provide a comprehensive education which blends academic proficiency in areas of study such as language arts, mathematics, science, and social studies with the attitudes, values, and behaviors that are critical for success.

Future Trends

- (1) Our complex world requires a high level of critical and creative thinking, decision making and problem-solving skills.
- (2) Society demands a high level of verbal, written and technological communication. Furthermore, as the amount of information increases, students need to access and organize it in a meaningful way.
- (3) As our family, social and societal structures change, positive self-esteem, independent living skills, and the willingness to consider the needs of others become more essential.
- (4) Success and fulfillment in the home, community and work place require effective teamwork, including the ability to lead and follow.
- (5) Moral and ethical issues become greater as society becomes more complex, requiring the ability and willingness to make responsible decisions.
- (6) An interdependent world needs people who participate in and contribute to their communities.
- (7) Our global marketplace and multicultural society require understanding and acceptance of diversity.
- (8) In a rapidly changing society, the quality of life, both personal and in the work place, will depend on the ability to grow and learn.

Outcome

- Students apply a variety of thinking and reasoning strategies to identify problems, solve problems, and make thoughtful decisions.
- Students demonstrate proficiency in many forms of communication.
- Students demonstrate respect, concern and caring for themselves and others.
- Students work successfully in a group as collaborative and cooperative members.
- Students understand and take responsibility for their actions, decisions and behaviors.
- Students understand their responsibilities, rights and opportunities for participating in the local and world community.
- Students understand and appreciate their own and other cultures.
- Students demonstrate skills and attitudes that enable them to be lifelong learners.

(from Federal Way School District, Federal Way, WA, 1992)



SAMPLE

STRATEGIES

Sample Objective: By September, 1996, all staff will demonstrate competency in identifying effective practices which are directly related to district-wide student outcomes. In order to achieve this, the time and money for staff development will be built into the 1992-96 budgets and calendars.

Sample Strategies:

STRATEGY 1: We will establish a Staff Development implementation team consisting of some Action Team members, as well as representatives of constituent employee groups including administration.

STRATEGY 2: We will provide time during the work week for all school employees to work toward their individual staff development goals.

STRATEGY 3: We will provide a method for each employee to identify his/her professional goals which will be relevant to his/her own needs as well as to those of the school district.

STRATEGY 4: We will establish a staff development system which ensures that there is transfer of adult learning into application.

STRATEGY 5: We will provide system-wide information on professional development opportunities to assist all employees in working toward their Staff Development goals.

STRATEGY 6: We will implement the pilot program.

STRATEGY 7: We will monitor and evaluate the pilot program.

STRATEGY 8: We will establish an effective monitoring program to ensure that the Staff Development plan contributes to the implementation of best instructional practices and, therefore, more positive student outcomes.

(Provided by the Portsmouth School District, Portsmouth, NH, 1992)



Date: _____

Committee Members:

SAMPLE
STRATEGY WORK SHEET

OBJECTIVE:

STRATEGIES:

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

(Provided by the Strategic Planning Roundtable, 1992)

SAMPLE

PORTSMOUTH ACTION PLAN

OBJECTIVE: The Portsmouth School District will initiate an on-going comprehensive staff evaluation for all school personnel that will reflect the school district's objectives by September of 1992. This will be fully implemented by July 1, 1993.

STRATEGY A: We will review current research on staff evaluation.

Steps	Actions	Time Lines	Responsibility	Cost
1	Review Research	3/23/92 - 5/05/92	Team V	
2	Meet with consultants Wagner, Auger, Wethersbee	4/01/92 - 4/30/92	Team V	\$500
3	Conduct ERIC search	2/07/92 - 3/09/92	Bob, Mary L.	
4	Collect and review plans from other districts	3/09/92 - 3/30/92	Team V	Phone Calls

STRATEGY B: We will draft a Continuous Improvement Plan.

1	Develop characteristics of effective plan from SIP list, Nashua plan, McCreel Criteria for teacher effectiveness and information from various staff members	4/92 - 8/92	Team V (Approx. 5 members 2 days)	\$500
2	Develop a framework to coordinate with student outcomes and best practices	4/92 - 12/92	Team V	
3	Draft forms	6/92 - 8/92	Team V 5 members	





Steps	Actions	Time Lines	Responsibility	Cost
STRATEGY C: We will disseminate the proposed draft plan.				
1.	Set up and print draft plan	8/92	Computer Specialist	\$400
2.	Present plan to principals, directors, department heads	8/92 - 9/92	Rob/Mary L. Bruce/Nancy	
3.	Present plan to staff in each school	9/92 - 10/92	Action Team V	
STRATEGY D: We will implement pilot program.				
1.	Identify instructional staff who will participate in pilots of Continuous Improvement and Staff Development Plans	9/92 - 10/92	Principals Action Teams IV, V	
2.	Participants will review the components of the plan and identify training needed with the assistance of a facilitator	10/92 - 11/92	Participants Representatives of Action Teams IV, V Facilitator	\$1,000
3.	Schedule 1-2 hours per week for team collaboration. Example: (a) specials scheduled during common time, reduced teaching time for middle and high school and/or no assigned duties; (b) provide subs to replace planning time Schedule peer observation time	9/92 - 6/93	Principals 2 Specialists Schedulers Department heads	(base) (1/2 year+)
4.	Implement training	9/92 - 1/93	Action Teams IV, V	\$5,000
5.	Expand plan to non-instructional staff	93 - 94	Action Team Reps. from each group	

Steps	Actions	Time Lines	Responsibility	Cost
STRATEGY E: We will monitor and evaluate pilot program.				
1.	Meet with participants each quarter to monitor plan	3/93 - 6/93	Action Team Representatives	
2.	Develop instrument to evaluate plan	2/93	Action Team Consultant	\$500
3.	Evaluate plan to make recommendations to action team	On-going 93	Pilot Participants	
4.	Review and summarize results	6/93	Action Team Pilot Participants	\$500
5.	Make revisions and print forms	6/93 - 7/93	Action Team	\$1,000

STRATEGY F: We will implement 2nd year of Pilot Program expanding to include non-instructional staff.

1.	Identify instructional staff	5/93 - 6/93	Action Team	
2.	Expand plan to include non instructional staff	7/93 - 8/93	Action Team Reps. from each group	\$500
3.	Identify non instructional	9/93	Action Team and Group Reps	

STRATEGY G: We will fully implement the Continuous Improvement Plan.

	Expanded to include all staff	9/93	Principals	
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Provided by the Portsmouth School District, Portsmouth, NH, 1992. The Portsmouth School District used Dr. Daniel Keck's Model 1990 and Strategic Planning for America's Schools, 1988 to guide their work.



SAMPLE

COST-BENEFIT ANALYSIS

Objective: By December 1992, the Portsmouth School District will develop student outcomes and methods of evaluating student competencies, which will enable all graduates to successfully function in the 21st century.

Strategy: Develop specific Student Outcomes.

Task 2: Content Specific Teams will develop Content Specific Student Outcomes that are aligned with Best Practices, Attitude Outcomes, Skill Outcomes, and Knowledge Outcomes. Benchmarks will be developed for primary, intermediate, middle and high school levels.

Responsibility: Robin Burdick and Suzanne Schrader.

Timeline:	September 1 - September 15	Form Teams
	September 15 - December 1	Develop Specific Outcomes

Cost: Eight Content Specific Teams with 6-10 members each.
 48 Members x 2 substitute days each x \$45.00 = \$4,320.
 Consultation for eight teams x \$300 = \$2,400.
 Visitation trips to four sites:
 Central Park East, NY - 3 air fares x \$184 = \$552.
 Williston, VT - mileage 240 miles x .27 = \$65.
 Johnson City, NY - 3 air fares x \$230 = \$690.
 Amherst, NH (Souhegan HS) - mileage 100 x .27 = \$27.

TOTAL: \$8,054.

Benefit: Substitute days will also allow for concentrated and "fresh" effort. Consultation will ensure that Teams have the best of current thought in developing the specific outcomes at the primary, intermediate, middle and high school levels. Consultation will be provided from UNH, USM, Lesley College, Boston University, Souhegan High School staff, etc.

Visitations will enable Team members to talk first-hand with staffs who are implementing outcome-based education successfully. This will ensure continued alignment between specific student outcomes and best practices and will provide a reality check for Team members.

(Provided by the Portsmouth School District, Portsmouth, NH, 1992. The Portsmouth School District used Dr. Daniel Keck's Model, 1990 and Strategic Planning for America's Schools, 1988 to guide their work.)



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OTHER RESOURCES

Contact the New Hampshire LEADership Center for a current listing of school districts in New Hampshire actively engaged in some form of strategic planning. Selected administrators have agreed to share sample documents and, insofar as is feasible, to provide "coaching" to those who would like advice and assistance with their own strategic planning activities.

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University of New Hampshire
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