



2016 NACSA LEADERSHIP CONFERENCE

This Isn't Rocket Science: Strategic Planning, From Ideas into Actions

Strategic Planning can feel overwhelming. Who should you include? How do you make sure your goals are effectively defined and that you have all the right elements in place? The questions seem almost endless. This hands-on, interactive workshop will give you the tools and techniques for an excellent strategic planning process that you can apply to any project or long-term planning that may come up in your daily authorizing work. You'll also have the opportunity to start putting these tools and techniques to use and get a jump-start on strategic planning before you head back to your office.

Session Title: This Isn't Rocket Science: Strategic Planning, From Ideas into Actions

Session speakers: Mary Bradley (Chicago Public Schools)
Cindy Schumacher (The Gov. John Engler Center for Charter Schools at CMU)

Context:

This workshop style session introduced a step-by-step process in developing a strategic plan, beginning with the development of a mission, vision and values, the identification of goals, and tracking progress. Attendees were given an opportunity to begin the strategic planning process using the materials provided by the presenters.

Key Takeaways:

1. **Always begin the strategic planning process by establishing a mission and vision with your team that communicates the importance and purpose of your work – this helps you and your team identify the “why”.** Ensure that all team members' thoughts are valued by allowing everyone to contribute words they associate with their work within the organization before creating your statement.
2. **Identify your organization/team's goals starting with the “Big Rocks” or the largest organizational goals.** Next, break these “Big Rocks” into “pebbles,” or Wildly Important Goals (WIGs) that are more action oriented goals. Continue to break these pebbles into project size goals that can be assigned to team members to lead and execute.
3. **Strategic plans are living documents – they should be revisited, updated, and modified frequently.** Assign target, check-in, and end dates for goals and track your team's progress by marking tasks as on track/delayed/off track. This will allow for meaningful and transparent conversations with team members.



Additional Resources:

Resource 1: Contact the Presenters

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Resource 2: The Gov. John Engler Center for Charter Schools at CMU Resource Page

<http://www.thecenterforcharters.org/resource-center/authorizers/best-practices/>

(see Authorizing Best Practices → Organizational Strategy Development)

Resource 3: 2016 NACSA Conference Materials

Resource 4: *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook* by Michael Allison and Jude Kaye