

Van Lunen Fellowship Applied School Project
“Engaging the School Board in the Creation of a Strategic Planning Process”

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- **Project Description and Outcomes**

For my Van Lunen project I wanted to build on St. Luke’s history of success by engaging in a process of strategic planning with our School Board to build a vibrant future for our school. The goal was not just to produce a strategic “plan” that might sit on a shelf gathering dust but rather to make sure that our leadership was constantly looking ahead and continually engaged in planning and visioning for our school’s short and long-term future.

Having a strategic planning process in place means we are continually evaluating our school’s goals and action plans to ensure we are best serving the needs of our students and families, staying a step ahead of our competition, and building a future for our school that captures the very best of the rapidly changing field of education. The School Board was excited about this direction and ready to spend more time looking to the future as opposed to dealing with current operations.

I began this project by presenting to the School Board an executive summary of the material from the Van Lunen sessions on strategic planning. I led them in a discussion on how integral strategic planning was to their role as school leaders responsible for the future strength and stability of our school. They recognized that even though our school is currently strong that does not eliminate the need to look strategically at our future.

If you want to plan for the future you first need to be sure of where you are. Thus, the next step in my project was to host a series of focus groups with St. Luke's school parents and staff. Six of these focus groups were held – three for parents and three for staff – to make sure everyone had an opportunity to participate. In each of these focus groups participants were asked to identify what they perceived as our school's strengths, weaknesses, opportunities, and threats along with potential "big hairy audacious goals" the school might pursue. Parents and staff members enjoyed the opportunity to share their views and saw the value in strategic planning. They appreciated feeling like they were included in this important initiative.

After concluding the focus groups, the School Board and administration held a Saturday retreat to review a summary of the focus group feedback and include their own analysis and ideas as well via a thorough SWOT analysis. Through a lot of give and take the board identified an initial set of strategic planning goals for the school's future. Those goals will be refined and narrowed in the weeks and months ahead during subsequent meetings. Consultant Elisa Carlson was a great help to me in clarifying what those goals needed to look like in their final form.

The next step in our strategic planning process will be to create action teams that will be responsible for taking our goals and creating concrete objectives and action steps to make those goals a reality. We hope to engage school parents and staff on these action teams so more people are involved in the strategic planning process. In addition, having these individuals involved will increase ownership of the goals themselves and the initiatives that grow out of them.

The School Board and administration will review the work of those action teams regularly to both monitor progress and ensure that the action teams' work is consistent with the original goals. Because this is a strategic planning process and not just the creation of a strategic plan the evaluation and implementation of our strategic planning goals may change over time as circumstances and conditions surrounding the school dictate. We plan to include review of the goals and the work of the action teams as primary agenda items in future School Board meetings. In doing so the thought and intention is that we can transform School Board meetings into forward thinking strategic time instead of getting bogged down in day to day operational issues best left to the administration. Several board members have expressed both relief and optimism at this potential change. As one board member put it, "For the first time I really feel like there's a reason I'm on this board."

- **What I learned during the process**

I learned that strategic planning takes time and a great deal of patience. We are not as far along as I had expected and hoped to be. I thought by now our goals would be complete and finalized and action teams would be formed. When you are working with volunteer board members who have their own jobs and lives you can't expect work to move as quickly as you can with your own full-time staff. However, the initiation of this strategic planning process has been a positive experience for everyone involved and generated enthusiasm. I've learned that it's more important to take your time and do strategic planning the right way rather than adhere to artificial deadlines that might make the finished product incomplete and unsatisfying.

A second important learning experience was the challenge and critical importance of condensing and clarifying all the inputs from the focus groups. Those sessions were invaluable for “taking the pulse” of our community and making sure that our final goals reflected on the ground reality in our school. However, they generated a dizzying array of wants and desires from parents and staff. Taking the time to identify themes and trends, toss out outliers and irrelevant minutiae, and focus on future thinking ideas helped insure that the strategic planning goals both reflected the will of our community while also being a product of “big picture” leadership and vision.

The goals we’ve established have the potential to build a strong and dynamic future for our school. Creating and following up with strong action teams will be the next big step – without that work the goals will stagnate and remaining nothing more than dreams or wishes. It’s up to us as a board to continue the overall work and make strategic planning a part of our DNA as we create and cast vision for St. Luke’s in the years to come. I’ve learned that it’s really up to me to keep pushing and framing the strategic planning process until it becomes “habit” for our board members as they approach their work. Equally important will be “onboarding” new board members into our strategic planning approach so they start their term of service with strategic planning as their “default” mode of operation as a board member.

- **The difference this project is making in my school.**

At this point in time there is no tangible or concrete difference in the workings of our school. We are too early in this project to expect to see any difference yet in terms of our day to day operations. The hope, plan, and prayer is that will come in our next steps when

we create action teams that will be responsible for taking our goals and creating specific objectives and action steps to make our goals a reality. Many of the staff members and parents who participated in the strategic planning focus groups asked about follow up and learning more about what would be happening next with the strategic planning process. My belief is that some of those individuals will welcome the opportunity to be a part of the action plans for making our goals a reality. When that happens, I think those individuals will be a key part of how this project really makes a difference in our school. Their enthusiasm, energy, and excitement about what we are doing will spread to others in their personal networks as word gets around about how strategic planning is building a stronger future for St. Luke's. Ultimately this project and our strategic planning process will only truly be successful if ownership of it and support for it broadens beyond the core of the School Board and administration. A strictly top down strategic plan probably means a more limited impact and an incomplete vision.

The School Board and administration will review the work of those action teams regularly to both monitor progress and ensure that the action teams work is consistent with the original goals. I hope there will be a fair amount of give and take between the action teams and the board/administration. I think board members will remain engaged in the strategic planning process if they are connected to the people doing the work on the ground and see meaningful, tangible progress being made. That will make strategic planning less of a theoretical exercise and more a tangible set of initiatives that are charting a thoughtful and successful course for the future of our school.