

## A Contrarian's Journey Through Strategic Planning

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### **Project Description and Outcomes**

For the past two years I have served as the Executive Director for The Prairie Centre for Christian Education (PCCE). The PCCE, in various forms, has served Christian schools on the Canadian prairie provinces of Alberta, Saskatchewan and Manitoba for almost 60 years. In its current structure, however, it is a relatively new organization, having its start seven years ago when three long-standing organizations merged. As you can imagine, such a merger was a challenging task that elicited feelings of both loss and excitement. The Executive Director who lead through that transition and for the first five years was the perfect person for the job, as he was able to gently and capably bring diverse boards and memberships together in a common vision and purpose.

When he left the position, PCCE had grown through its infancy, and was ready and eager to take the next steps. As the new leader, my plan was to use my first year on the job to learn more about the organization from an "insider's" perspective and then in my second year to engage the community in a strategic planning experience and this is where the Van Lunen program intersected with my work. I do not have any formal experience in leading a community other than the school I worked at through the creation of a strategic plan, so through the work, study and mentorship of the Van Lunen program, I was hoping to engage in two important tasks:

1. The creation of a strategic plan for PCCE that would direct our future work for the next 5+ years.

2. Gain a deeper understanding of the strategic planning process, so that I could assist PCCE schools in the process, as that is one of the services we would like to enhance.

In many ways, my two goals were achieved but not necessarily in the ways that I anticipated.

### *PCCE's Playbook*

If I honestly assess my own biases, I came into the “strategic planning” arena with a bit of negative attitude as I had seen or been a part of several strategic planning processes that were time and resource consuming, and then “sat on the shelf” until it was time in another 3-5 years to update the plan. I realize that this was probably the fault of the organizations themselves and not inherent to the strategic planning process itself. Nonetheless, this was my bias coming in, so I was open to looking at different ways or structures for PCCE to set a direction for the future.

As I began to work through the project, two books gave me a glimpse of a different way. *The Nonprofit Strategy Revolution: Real Time Strategic Planning in a Rapid-Response World* by David La Piana lays out a process that is described as nimble, organic, fluid and responsive. While I did not follow the methodology closely, it opened my eyes to a new way of thinking about the process and outcome. The second book was *The Advantage* by Patrick Lencioni in which he references the development of a Playbook. Working with Lencioni's Playbook framework, the concept was appealing to me as while it serves many of same purposes as a traditional strategic plan, it is a highly dynamic, flexible and responsive document that is living and breathing, continual being updated and modified to meet the organization's needs. So, based on these two books and the opening of my eyes to a different way, the PCCE has created a Playbook for our organization.

In many ways, the change in name and focus has also removed the pressure to “get it right, nailing down all the details” and has (and will continue to) engaged our community in discussions that will carry on in the coming years as we update, adapt, revise as new challenges and opportunities arise.

A key conversation with Zach Clark focused the work of the Playbook as through the course of the discussion, he was able to distill my ramblings about our organization's work into 3 main core areas (learning experiences, thought leadership and relationships & partnerships), along with our "big hairy audacious goal" ("to be your essential partner in Christian education"). This was a key conversation as it allowed me to more clearly articulate the "why" of PCCE, moving away from a focus on the "what." Zach's careful listening and astute compilation of thoughts provided us with the structure of our Playbook moving forward.

While the process of creating this plan has not evolved in a linear and predictable manner, I am pleased with the work we have done thus far as it gives us a path forward. I also recognize that it is truly a work in progress, which I guess was my goal when moving toward a Playbook format! If you are interested, a sampling of the Playbook is attached.

#### *My Understanding of the Strategic Planning Process*

Due to the journey described above, I am not sure that I achieved my goal of learning about strategic planning so that I could help a school through the process. In many ways it has been a messy process that did not unfold in the ways I anticipated, and I did not emerge with a replicable process that I could use with a school community that was looking for a strategic planning model to follow. Perhaps as I continue to walk our PCCE community through our Playbook journey, I will be able to distill some strategies and processes that would be useful for schools, but at this point it is still too undefined to see that path forward.

#### **What I Learned During the Process**

I learned a few things about myself, PCCE and the process:

- My "contrarian" way of being. Creating a traditional strategic plan through the hiring of a consultant and following the "regular" path didn't work for me. Not being satisfied with the status quo and regularly looking for something different, is something I see in myself, both

in this project and in other things as well. Sometimes this is an admirable characteristic, but if it is invoked “just because” then it can become a detriment.

- Engaging our community/member schools in the process was difficult. Understandably, the teachers, school leaders and board members (our constituent groups) are more highly engaged in the work in their local community/school, and an organization such as PCCE is one (or two) steps removed from this, so it is challenging to have people participate in the hard work of envisioning the future of organizations such as PCCE. Our first and most broadly-cast engagement strategy was the distribution of surveys. We had a good uptake (both in terms of quantity and content of responses) of surveys from both teachers and school leaders, but very minimal response from board members. Participation in follow-up forums and discussion groups was very limited. The scheduled reflection/engagement time at our Annual General Meeting was cut short due to an urgent and important issue that needed our time and attention. Because of these multiple factors, the Playbook does not have the level of community input that I was hoping for. Despite this lack of formal input, I am confident that it is reflective of the direction we need to go and as an organization we will continue to solicit and include feedback as we update and modify the Playbook going forward.
- I had heard previously that when an organization begins strategic planning or fundraising programs, it brings to light lingering issues that are not necessarily directly related to the new project but have been simmering under the surface. When a community invites conversation and discussion, these issues arise. We experienced this and while the issues were not a total surprise, we are now dealing with them.

### **The Difference This Project Made in My Organization**

Although I think we have set ourselves on a good path, I think that the true difference in our organization will only be known in three to five years when we look back and see if PCCE is moving in the direction of being our schools' "essential partner." As that is truly an audacious goal, I do not think we will have fully achieved it but I would hope to see significant movement in that direction.

In the meantime, the process and product have both been important steps in our organization's growth. The gathering of the PCCE community to talk about our purpose and future has been helpful and healthy. It opened up conversations and topics of discussion that, while not always pleasant, were important for our growth. In addition, the actual process and work of creating the Playbook, required me to think deeply about the organization. In the busyness of regular work life, leaders do not often take (or make) the time to reflect, to dream, to listen, to plan, so this process was very good for me as a relatively new leader in the organization.

In terms of the Playbook itself, as the Executive Director I am really looking forward to working with it. It gives me clarity in terms of the organization's focus and future direction. I am excited about the new things on the horizon and the anticipated benefit to the schools in our PCCE community. And if I'm being honest, there is also a bit of apprehension and nervousness as to whether we will be able to accomplish our goal of being "essential," but I guess that is what will keep me and our organization focussed and intentional.

Overall, the process has been one that has lead to significant personal and professional growth for me. I am looking forward to diving deeply into using the Playbook to guide and lead our organization into an exciting future. I am thankful to the Van Lunen program for the opportunity and its support of Christian education, both on the Canadian prairies and beyond.

# Prairie Centre for Christian Education Playbook

(A VERY Abbreviated Version)

**Goal:** to be your essential partner in Christian Education

## Three Priority Areas

### **Learning Experiences**

Description:

- Learning within environments that provide more than just content
  - The experience connected to the learning is key
1. Study tours for the PCCE community: determine the key priorities and locations for learning experiences. Possible tours are: Israel/Holy Land, Alberta Indigenous Community Immersion, Australia (connected to the International Transforming Education Conference in July 2019), EduDeo Study trip to Zambia or another location.
  2. Executive/Senior Leadership Group: Facilitate regular meetings for school's executive/senior leaders (Executive Directors principals/heads-of-school of large and/or multi-campus schools).
  3. Support for new principals, providing opportunities for them to learn more about Christian education within the PCCE community
  4. Increase the Teaching for Transformation capacity of PCCE schools through the creation and implementation of a "fidelity" program that would allow schools to assess and address where they are on the Tft journey.

### **Thought-Leadership**

Description:

- Learning together, as a group and within a group
  - Together moving toward expanding perspective and thought-patterns
  - Not just staying "on top of things," but being leaders in the Christian school context as we continually reflect, learn and grow together
1. Establish a think tank of 6-8 PCCE people (teachers, leaders, board members) who will convene twice each year to "climb the mountain" to see the lay of the land, anticipate issues and provide direction and support to PCCE
  2. Book Club - Select one book each year that will be the focus for PCCE. On a regular basis, we will then facilitate discussions (on-line/electronic, in-person)
  3. High School Learning Group - gather to determine the factors that contribute to their enrolment challenges and then consider new ways of doing high school that would enhance their vision of Christian education and increase enrolment/retention.

### **Relationships**

Description:

- Opportunities for flourishing relationships
  - Strengthening partnerships within and beyond PCCE
1. Hire a part-time consultant/facilitator to support and provide leadership for the independent schools in Alberta around topics such as government relations, regulatory changes, policy development & revision.

2. Engage in research connected with developing formal relationships with “preferred partners” for PCCE and its schools.
3. Organizational partnerships will be strengthened where mutual benefit is possible.
4. Board Development: develop additional workshop sessions that Boards would find helpful by continuing/resurrecting discussions with Christian Schools Canada and Christian Schools International.
5. Facilitate the establishment of electronic collaborative interest groups
6. PCCE board members will play an active in connecting with our member schools to support the schools in our organization, “keep an ear to the ground,” be aware of current and emerging issues, highlight PCCE information, updates etc. to the schools

### **General Operations**

To facilitate growth in the above listed areas and to ensure organizational health, PCCE will also address the following topics:

1. Convene a task force to investigate our current membership and fees structure
2. PCCE Board will engage in focussed discussions around PCCE’s identity and clarify our core values
3. Update our communications profile.
4. Determine a plan for the use of the “Intellectual Property” fund that is the result of Teaching for Transformation partnerships