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FALL OUT FROM STRATEGIC PLANNING

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A new client recently contacted me to say that a consulting firm had used a "broad brush" approach to strategic planning at his School by engaging much of the community and interviewing all of the teachers and staff. His next comment was "Can you come and help us to sort this out because one of the outcomes of the process, which was a recommendation to improve our faculty compensation and delivery system, has triggered a "hornet's nest" of feedback from teachers and a deterioration in school climate."

This need not have happened at this School and it can be avoided at your school. Before hiring a strategic planning consultant, there should be a careful assessment of the kind of strategic planning format that is most suited to the school's needs, climate and culture at the time.

The "broad brush" approach mentioned above is meant to involve as much of the parent, staff, and alumni community as possible in providing input for the board and senior leadership team to consider in formulating vital strategic priorities for the next three to five years. In this format, often a large committee is formed of board, administration, parents, faculty, alumni and students. Such a committee can be as large as 35 individuals who meet in a front end planning workshop, followed by some months of home work and a final workshop where they hammer out priorities, potential action plans, budget implications and examples of Key Performance Indicators.

The major benefit to this approach is inclusion, which may also involve an online survey seeking constituent opinion. This method should not be used, in this Consultant's opinion, under the following circumstances: when heads are in their first year or two; when the school has just been through a major crisis; right before the search for a new head; or when the board and/or leadership is concerned that the process may be hijacked by a disgruntled group making a concerted effort to promote their own, potentially narrow or controversial views. Furthermore, if an online survey is used, it must be designed and tabulated carefully and professionally, and its timing is crucial. If launched at the wrong time or worded poorly, it can backfire.

An Efficient Effective Process without Backlash

The broad brush approach IS appropriate when the school is stable; when the head is trusted and has been in place for several years; or when there has been no recent, real or perceived constituent



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crisis or an incident that triggered a crisis. The broad brush approach fits best with mature schools not in the process of transition or turnover and where school climate is healthy and there is little teacher unrest.

Another approach is the "direct" or "focused" approach which begins with the vision and guidance of the board and head and then extends outward by conducting focus groups in order to gather input from a cross section of constituents. This information is then summarized and presented to the board and management at the beginning of a four hour workshop. During the remainder of the workshop, participants vote on key strategic priorities from as many as 40 themes heard in the focus groups; work in small groups discussing themes, budgets and time lines; vote again to agree on a manageable set of final strategic goals; and engage in a preliminary discussion of action plans and KPI's. After the workshop, committees are formed around the 5 -7 key priorities. board members and administrators chair these committees who then meet over a 2 to 3 month period to develop specific action plans and KPI's to be presented to the board for final approval.

A third approach is very similar to the "focused" approach but the workshop may also contain a "sprinkling in" of a few key teachers, alumni, parents and/or students.

The latter two approaches obtain a great deal of constituent feedback through the participation of as many as 100 to 200 constituents in active focus group discussions. However, the final decisions remain in the hands of the board assisted by the senior leadership team.

What is the right approach for your school? Littleford & Associates undertakes strategic plans for all types of schools and organizations including all three of the approaches described above. The key is to choose the right approach for the times, the culture and the needs of the School.

John Littleford
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