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IS THE TIMING RIGHT FOR STRATEGIC PLANNING (OR NOT)?

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Littleford & Associates is currently receiving many inquiries from heads and board members worldwide about the wisdom of launching a strategic planning process now when their time and energy are already stretched.

We have heard from several prominent heads of school about this issue that is top of mind right now for them and for others:

“I’ve heard many schools pause or outright abandon their strategic plans due to COVID. Should we dust them off and pick up where we left off or start from scratch post-COVID... and when we might be ready to do so and how we’ll know when we’re ready. There’s been lots of talk about decision-making matrices and “if-then” decision trees regarding how we’ll know that we’re ready for more long-term strategic thinking.”

“It seems that a lot of strategic planning has been shelved temporarily due to the day-to-day demands of dealing with the Pandemic. I expect there to be a necessary rush of that planning once we have come out the other side of COVID. We will of course have the natural backlog of planning that needs to be done just because most of us have been in such a day-to-day mode and have been putting off long-term planning for a while. Second, I expect that a lot of the discussion and planning that happens is going to be driven to a great extent by what we have learned during that time. We have all identified strengths and weaknesses that we had in delivery methods, technology, communication, curriculum, fund raising, hiring, and the list goes on and on. It will be interesting to see how what we have used during this time of crisis is going to be woven into the strategic planning that is sure to follow.”

I. Suggested Approaches to Strategic Planning

This Consultant recommends three approaches to strategic planning for international and independent schools and the choice depends upon each school’s culture and climate at the time. During this time, it is especially important to take the “temperature” of the school community and



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to choose wisely.

The focused/directed approach limits participation in the actual strategic planning exercise to the board, the head and key administrators. This is the safest process to choose under these circumstances: the head of school is in a transition period; a number of board members and/or the board chair are new, thus creating a situation where there is a loss of institutional memory; and the school community is feeling overwhelmed and stressed.

This approach does not exclude constituent participation; focus groups composed of a cross-section of constituents provide input for the board and senior leadership to consider as they formulate the new strategic goals, actions plans and KPI's. The focus group feedback checks their opinions and priorities against those of the board and the senior management team in order to ensure that there is alignment with constituent sentiment going forward.

The constituents who participate in the focus groups should include some or all of the following: current parents, past parents, faculty and staff, alumni, major donors, heads of feeder schools and heads of sending schools (if applicable). Parent participants should represent a range of grade levels, and faculty and staff should be chosen randomly but senior leadership should check to make sure that divisions, years of experience, gender and subjects taught are represented. This approach is the least expensive, most expeditious and keeps a high level of interest.

The broad brush approach includes focus group feedback also but expands the group participating in the strategic planning exercise to include representatives from the key constituent groups. Selection of these outside participants is very important because the wrong mix may result in bringing to the table an agenda that represents short-term, narrow interests versus the long view. Some potential outsiders may lobby to be included, and that should always be a red flag. This Consultant is hearing frequently these days that many board members and heads are feeling more vulnerable and struggling to withstand pressures from current parents and alumni.

The advantage to this process is that it is perceived as democratic and more transparent, and there are more demands for inclusivity and open communication today. However, until the COVID crisis is behind us and school feels more "normal", this Consultant recommends avoiding the use of this model until perhaps next year.

The third approach is a hybrid that combines some elements of both. This allows the involvement of a limited number of participants who are neither members of the board nor the leadership team.

It channels outside participation a bit more carefully as opposed to opening it up broadly. This may be the way to go perhaps in late spring or early fall of this year, and conducting the focus groups in advance is still very important in order to gather, hear and finally incorporate community opinions



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in the ultimate plan.

In summary, we are not suggesting that boards and heads conduct strategic planning in a vacuum; they simply must be politically smart in making this decision.

II. A Way Forward

Nevertheless, boards and heads may not only be wary of starting a strategic planning process now, they might even pause or completely abandon their current plans. This is probably a reflection of COVID exhaustion or stress, but is this decision wise?

This Consultant would argue that school leadership has an opportunity here that outweighs the risks. All strategic plans contain goals relating to financial stability, programmatic excellence, attracting and retaining excellent faculty and fundraising for endowment and capital needs. But lessons learned from COVID and BLM experiences can be the foundation for a more relevant, less staid plan. A new or revised plan might address expanded goals such as alternative academic programs and delivery, student and faculty wellness and DEI related issues.

Whatever the strategic planning process or the timing chosen, the process must always begin with mission clarity and unity. More and more of our strategic planning clients are asking our Firm to begin that exercise with a session on brainstorming and revisiting the school's mission and vision. The board may need to examine the mission again especially because the school demographics may have changed; some families may have left and some new ones have joined.

One Head describes the “push pull” of refreshing a mission statement: there are those who want it to reflect uniqueness and those who want to ensure that it preserves the traditions that they value.

The mission statement and a strategic planning process must be grounded in school history and culture and be sensitive to current school climate.