10 Mistakes to Avoid

Developing a Strategic Plan for Today's Challenges

Virtually all districts have a strategic plan, but does your district have a focused plan that guides your day-to-day activities? These 10 lessons may help guide the way.

1 DON'T START WITHOUT FIRST GAINING A CLEAR, FACT-BASED UNDERSTANDING OF THE DISTRICT'S CURRENT STATE.

With myriad opinions and theories on what could be done differently, the district must begin the planning process with an objective fact-based understanding of the district's strengths and challenges. This includes not only an in-depth quantitative analysis but gathering qualitative perceptions and benchmarking data.

2 DON'T DRAFT A PLAN THAT SKIMS THE SURFACE; ADDRESS THE ROOT CAUSES.

When examining the district's performance, go beyond discussing the symptoms and, instead, push to identify the root causes using the 5 Whys. A strategic plan that works to address underlying issues will lead to success; otherwise, your strategic plan could be directing effort to the wrong areas.

3 DON'T SHORTCHANGE DEVELOPING A COGENT THEORY OF ACTION.

A well-articulated Theory of Action reflects the district's core beliefs and is a framework within which all of the district's Priorities, Initiatives, and Action Steps align. The strongest theories of action are focused, easily understood by virtually all district stakeholders, and guide critical tasks and workflows, organizational arrangement, and culture in the district.

4 DON'T TREAT EVERY IDEA AS A GOOD IDEA; DEVELOP A SHORT LIST OF HIGH-IMPACT PRIORITIES.

Creating a long list of Priorities is easy, but identifying a small set (less than five) of the most important levers for improving performance will help drive results. Manage expectations that not all ideas may find their place in the final plan. Establish a process for how final decisions will be made.

5 DON'T FORGET TO INCLUDE SPECIFIC MEASURABLE ACTION PLANS.

While defining high-level vision and Priorities is important, a strategic plan should specify Initiatives and Action Steps that the district will undertake. The strongest action plans detail the roles and responsibilities of various school and central office personnel, establish key milestones, and address any budget shifts that may be necessary.

6 DON'T FORGET TO INCLUDE MANY PARTS OF THE ORGANIZATION, NOT JUST ACADEMICS.

While the ultimate goals of the strategic plan are likely focused on student achievement, other departments, such as finance, human resources, and operations, are essential to achieving the district's mission. The strategic plan should articulate specific actions for these areas to align the district's work.

7 DON'T JUST ENGAGE IN OPEN-ENDED DISCUSSIONS WITH STAKEHOLDERS; SEEK ACTIONABLE FEEDBACK.

Stakeholders and community members can most effectively provide meaningful, actionable feedback and input once an initial draft of the plan is in place. DMC has found that this approach is far more effective than open-ended discussions about their concerns and hopes for the district.

8 DON'T FORGET TO INCLUDE LAGGING AND LEADING METRICS TO TRACK PROGRESS.

Both leading (input-oriented) and lagging (output-oriented) metrics should be tracked to measure progress and inform action. While external-facing scorecards may largely consist of lagging indicators, leading measures can be tracked internally to allow for timely course correction when needed.

9 DON'T JUST LAYER NEW INITIATIVES ON TOP OF EXISTING ONES.

Strategic planning should not be about layering in more Initiatives. Seek to leverage and build upon the work being done in the district and create a coherent and aligned approach to moving the work forward.

10 DON'T FORGET TO ESTABLISH CLEAR IMPLEMENTATION AND MONITORING PROCESSES.

Effective implementation requires detailed planning and communication, cultivation of leadership capacity, and the analytics to monitor progress. The implementation plan and monitoring processes must also be tailored to the district's strengths, weaknesses, and available resources.