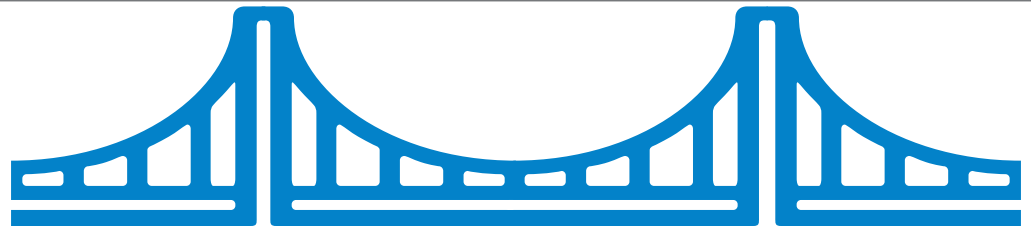




Maria J. Ribera, President
 Richard J. Burke,
 Senior Executive Consultant
 Jacqueline Abrahams
 Robert A. Bailey
 Edward J. Barrett
 Joseph W. Bracco
 Albert E. Catelli
 Lois J. Cavucci, Ed. D.
 Sr. Carol Cimino, SSJ, Ed. D.
 Michael M. Denison
 Lois K. Draina, Ph. D.
 Donald L. Edwards, Ed. D.
 Rachel L. Ellingson
 Richard E. Feitel
 Susana A. Garcia
 Gary J. Gelo
 Frank A. Glowaty
 Stephen J. Hammond
 Susan R. Hoffman
 Joseph D. Hollowell
 Jennifer C. Kensel
 Fr. Richard J. McGrath, OSA, Ph. D.
 Lisa J. Nilmeier
 Aline P. Norwood
 Deborah L. Papa
 G. Joseph Peters
 Thomas H. Posnanski
 Kim R. Pryzbylski, Ph. D.
 Mary Beth Riley
 Mary Lou Schoone
 Barbara F. Simmons
 Jennifer M. Trefelner
 Robert S. Webb
 Nicholas M. Wolsonovich
 Frederick Zilian, Ph.D.



The Bridge from Mission to Vision: Effective Models for Strategic Planning

Based on 42 years of experience working with Catholic schools, dioceses, parishes and religious orders, Catholic School Management believes that if Catholic leaders are concerned about the future success of their schools, there isn't anything more important they can do than to plan strategically for their future. A successful strategic planning process in a Catholic school, diocese, parish, or religious order should produce the following outcomes:

- A determination of what drives the organization's growth in terms of programs, people and resources and/or the reasons why growth may not be occurring;
- A path to the future that transcends changes and transitions in leadership;
- An identification of resources and initiatives that are critically important to the organization's future success;
- The ability to be proactive versus reactive in dealing with rapidly changing circumstances that may confront the organization in the coming years;
- Effective communication plans that enable all stakeholders to understand the organization's vision and to translate that vision into personal commitment to achieve the preferred future.

There are many processes and models for developing strategic plans. The most effective strategic planning processes reflect the belief that both data-based information and the perspectives of people are equally important to the ultimate design and success of the plan. Planning processes should always be highly collaborative and participative to ensure excitement and investment in a plan, beginning with its creation. External facilitation is recommended in order to ensure that key stakeholders – including administrators and Board leadership – can participate fully in the process.

Before deciding upon the best model for strategic planning, Catholic school leaders should ask themselves the following questions:

1. If a strategic plan currently exists, does the plan address and achieve the right priorities? Is the plan being used to guide decision-making and advance the mission? Is the plan evaluated regularly, is progress reported and is the plan updated on at least an annual basis?

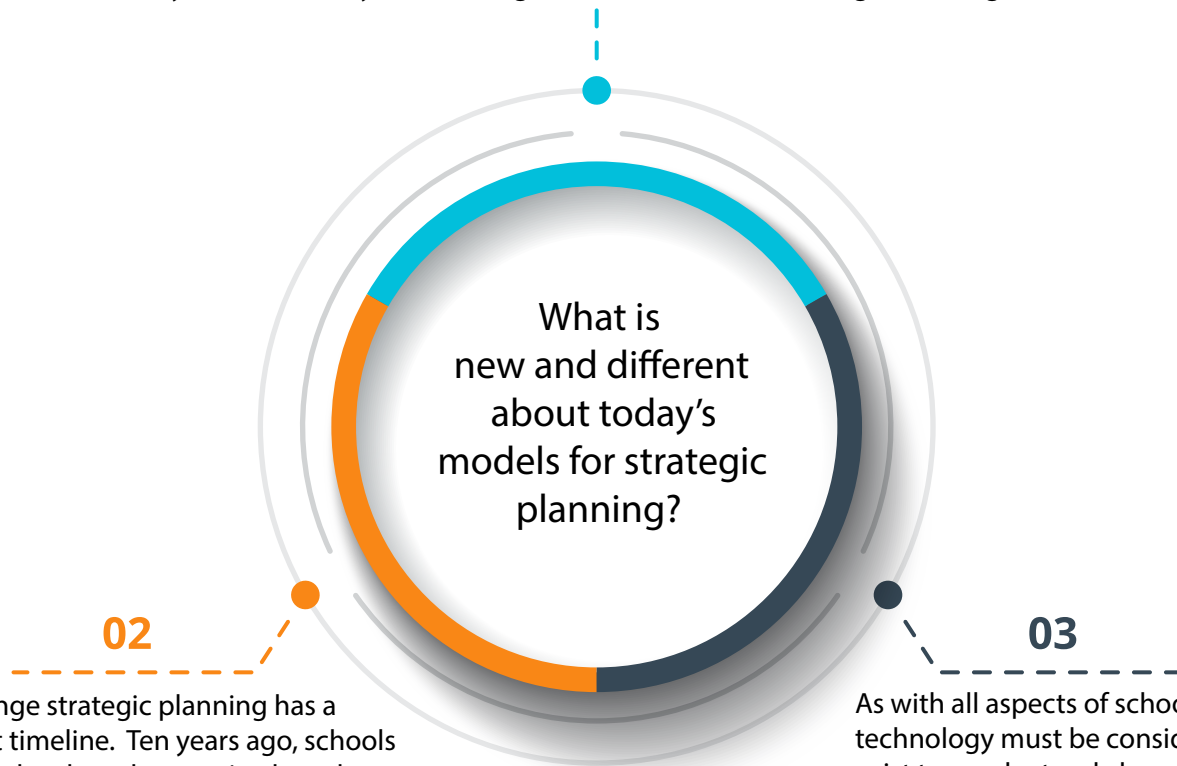
2. For those schools that are not currently operating with the benefit of a strategic plan, is there previous experience in strategic planning? If so, were those plans implemented effectively or merely kept in binders sitting on shelves gathering dust?
3. Are there specific areas of focus to be addressed by the strategic plan and have desired outcomes been identified?
4. What resources does the school have to devote to strategic planning?

Innovative Planning Practices

As schools today pursue contemporary approaches to advancement, so too should schools be aware of innovations in strategic planning practices. As with any process, there should always be consideration of new and better ways of performing the task.

01

More than ever, a successful approach to strategic planning requires strong analysis of data and the ability to not only conduct research on changing conditions, but to update that data continuously over the life of the plan. There is an increased reliance on demographic studies, assessment of the economy and operational benchmarks to both develop and evaluate plans. In particular, Catholic schools should be using the National Standards and Benchmarks for Effective Catholic Elementary and Secondary Schools to guide their assessment and goal-setting.



02

Long-range strategic planning has a different timeline. Ten years ago, schools typically developed strategic plans that covered a period of seven to ten years. This lifespan was then reduced to five to seven years. Today, it is rare that an organization looks for more than three to five years from a strategic plan – and even then, quarterly reviews of progress, annual evaluations and written updates are critical to success.

03

As with all aspects of school operations, technology must be considered. Options exist to conduct web-based market research as well as online surveys to gather data to inform the planning process. There are many ways to gather input from stakeholders in developing a plan and a variety of web-based tools that can be used to effectively share, manage, update and evaluate a plan.

Fundamental Planning Concepts

What components are essential to the development of a strategic plan that will keep a Catholic school vital and viable into the future? When working with schools, parishes, dioceses and religious orders to facilitate the development of strategic plans, Catholic School Management uses the following definition of strategic planning:

“Strategic Planning is the process of developing and maintaining a strategic fit between the institution’s goals and capabilities and its changing marketing opportunities. It relies on developing a clear institutional mission, supporting goals and objectives, a sound strategy and appropriate implementation.”

– Kotler and Fox, Strategic Marketing for Educational Institutions

This definition reinforces that a strategic planning process needs to keep the mission of the school at the forefront with the resulting plan providing the bridge that takes the school from its current state to its vision or desired state. Ensuring that the school has a clear, well-understood mission statement is an essential first step in a successful planning process. A successful strategic plan includes goals and strategies that are based on the school’s unique mission and designed to leverage that mission for future success. In addition to being mission based, the most effective strategic planning processes include the following characteristics:

- 1. Understanding of roles and responsibilities as they pertain to strategic planning.** It is the responsibility of owners and governance bodies to ensure the existence of a current strategic plan. Ideally, there is a policy and planning committee in place on the School Board to oversee the process of developing, implementing and evaluating progress achieved using a strategic plan. Strategic planning cannot and should not be the sole responsibility of a school administrator.
- 2. Developing research-based and data-driven planning assumptions that underpin the strategic goals and consider such factors as the economy and demographics of the area from which a school draws students.** How can a Catholic elementary school plan for kindergarten enrollment without knowing current and projected birth and baptismal rates in the areas from which it draws students? How can a Catholic high school determine how to manage the affordability of its tuition without understanding the local economy?
- 3. Performing a detailed and honest assessment of the key areas that the plan will address.** According to the National Standards, these areas for schools are: Mission and Catholic Identity, Governance and Leadership, Academic Excellence and Operational Vitality. Additional areas of focus may be addressed as well, particularly if a school intends to initiate a significant change in program or school life, a capital campaign, or a major facility improvement.
- 4. Using processes that are participative and collaborative and engage representatives of all stakeholder groups to create and validate the strategic planning goals.** Planning requires the involvement of a broad range of representatives of the organization with a vested interest in its future success – diocese, school board, administration, faculty, staff, alumni/ae, parents, parents of alumni/ae, students, donors, benefactors, partner schools, or schools that graduates attend.
- 5. Evaluating and updating the plan frequently.** For a three to five year plan, that means building objectives and action plans annually rather than for multiple years, reviewing and reporting progress quarterly and completing an annual written evaluation and update. This gives the plan increased flexibility, enabling quick responses to changing circumstances.
- 6. Setting visionary goals.** A visionary approach requires describing the desired future that the school seeks to achieve versus supporting plans needed to get there. One of the most effective questions that can be asked during a strategic planning process is: “If we did not have the school we have today, would we create the school we have today?”

VISIONARY GOALS:

“The school will create space that enables students and teachers to take advantage of new technologies and learning opportunities.”

“The school will design and create a state of the art facility providing a campus where students can learn, grow, pray, play and perform in a safe and nurturing environment.”

2016 Summer Certificate Programs

June 27 - June 29, 2016

Embassy Suites Monterey Bay
Seaside, California

The most complete professional development programs
for Catholic school leaders.

Make reservations today! REGISTER HERE



MEET ...

Jennifer C. Kensel

Director of Planning Services
and Administrator Searches
since 2002

Planning, Mission, Assess-
ments, Administrator Searches,
Strategic Management and
Development Programs

Jennifer C. Kensel has extensive leadership experience in both the corporate and nonprofit sectors. Previous to working at Catholic School Management she held the position of Vice Principal for Strategic Planning and Marketing at Mercy High School in Middletown, Connecticut where she was responsible for strategic planning, marketing, development and public relations. She also led the school through a successful capital campaign.

7. External facilitation and consultation should go beyond the delivery of the written plan to provide assistance with critical elements to support long-term success. Guidance related to communication and marketing during and upon adoption of a plan should be provided along with guidance in recommended systems, templates and procedures designed to ensure maximum buy-in and success throughout the strategic plan development implementation, monitoring and evaluation processes.

Keys to Success

What are the keys to success in using the strategic plan as the means to create a new vision for the school and achieve a desired future state?

1. Schools must realize that strategic planning is about making choices by remaining mission driven. There is seldom a school that has the resources to do everything that it desires to accomplish.
2. Schools should determine through their assessments where they are currently most successful and identify ways to sustain that success.
3. Successful schools develop strategic plans that effectively integrate their planning assumptions to help them distinguish true opportunities from chance distraction. Researched and data-driven assumptions of economic and demographic conditions combined with understanding of educational programs and trends are imperative.

PLANNING DON'Ts

- Develop the plan in isolation with only a few like-minded people involved
- Design an unrealistic plan with no use of data to provide objectivity
- Build the whole plan at once rather than developing annual objectives and action plans to achieve the strategic goals
- Fail to provide ongoing communication to key stakeholders and “owners”
- Develop a strategic plan during a crisis

In conclusion, an effective strategic planning process provides a Catholic school community with an opportunity to take a step back, reflect on what is inherently good about the school and identify what can be done better. This includes an examination of how the school fulfills its mission as a Catholic school and exemplifies its Catholic identity, the strength of its educational and student life programs, its ability to market itself for image, enrollment and resources and the overall effectiveness of its operations.



A division of Christian Brothers Services

For more information about services, publications and training programs, call 203.421.5169 or visit us at: catholicchoolmgmt.com.

© Copyright 2015 Catholic School Management, a division of Christian Brothers Services.

This material may not be reproduced in whole or in part without written permission.

Published in September, November, January, March, May and July.

CSM and Catholic School Management Letter are registered trademarks of Catholic School Management