



Are You Ready for a Strategic Planning Process?

By David Beecher, Principal, Sound Consulting

Schools and other non profit organizations, and their chosen strategic planning consultancy, must share the same commitment to the answer of the following important question: Why should a community invest resources—human, financial and time—on a strategic planning process?

That answer is clear, unambiguous and simple: *A Strategic Planning Process is to improve and/or continue the excellence of the School's/Nonprofit's programs, the expansion of its mission, strengthened enrollment, fiscal sustainability and to build a stronger culture.*

There are three prime moments when a STRATEGIC PLANNING PROCESS (SPP) is best undertaken:

- ***At a moment of leadership transition***
 - Each school or organization goes through leadership changes—some every ten years or so if you are blessed, others sooner. It is our firm's belief that the second year of new executive leadership is ideal for a Strategic Planning Process (SPP). The new CEO has had a full year to become acclimated to her new position, the school or organization, get to know all important stakeholders, understand the culture, and begin to make the first set of changes leading into an SPP. In the second year, a SPP can galvanize the community behind their new leader and launch it to new heights.
 - Another moment of transition potentially warranting a SPP, is when there is a significant change in the Board of Trustees, particularly in the chair's position.
 - The third positive moment is if a school or organization is blessed to have a long serving leader, we recommend a SPP every five to seven

years so as to build on momentum created, and avoid falling into complacency.

- ***At a moment in the organization's history that invites such a process.*** For example, doing a SPP just prior to a school's accreditation may be a wise use of resources and provide that school's leadership with much of what they need to complete that accreditation self study. Additionally, an organization may be in conversation with a donor who is anxious to make a difference with a major or transformational gift. However, that organization does not want to take the chance of squandering that gift on an initiative that does not fit with their long-term goals.

- ***At the moment when the previous plan has been completed.*** Every school or organization should be living under a current or relatively current **Strategic Action Plan**. Decades ago the time frame for such a plan was 7-10 years. Our world changes at such a rapid pace that a 7-10 year plan becomes out of place quickly. Our firm believes that 3-5 years is the appropriate run for a quality plan. As an organization completes it's plan they should take a brief break and then reenter the planning process.

A **Strategic Action Plan** provides each school or organization with a set of **GOALS** that provide a roadmap, carefully thought out direction for the near future. A **Strategic Action Plan** excites and motivates a community to launch into action to improve their organization or school. And a **Strategic Action Plan** galvanizes a community, further strengthening its culture.

- Excites
- Galvanizes....brings people together
- Defines goals

Sound Consulting provide expert planning counsel and we love helping communities chart their next strengthening journey.

STRATEGIC ACTION PLAN—Sound Consulting uniquely identifies its strategic plan work as **ACTION**-oriented. See our upcoming post on why this distinction is so critically important to your school or organization.