
Strategic Planning Workshop

Fall 2018



October 18, 2018



Why Plan?

- A commitment to planning allows the organization to set itself up for success.
 - When you plan you are anticipating future challenges, issues and threats, and getting in front of them.
 - Most importantly, planning moves the organization towards positive outcomes. It points everyone in the same direction; it provides a common purpose.
 - Proper planning could mean the difference between major failure or major success.
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How will we create a successful Strategic Plan?

The Strategic Plan Life Cycle:



Clarify - Review *Vision* and *Mission* statements, SWOT Analysis, Gap Analysis

Plan - Identify Primary Objectives, Create SMART Goals and Action Plans

Execute - Implementation of Plan

Evaluate - Periodically review plan , learn what works, what doesn't work and make corrections/adjustments

**Successful Strategic Planning
takes a village.**

CLARIFY:



Historical Data

- Vision and Mission Statements
 - Last Year's Goals
 - School Public Accountability Reports
 - Teacher Salary Schedule
 - Teacher Retention Rates
 - Organizational Charts
 - Financial Report/Capital Assets
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What is S.W.O.T. Analysis?



The primary aim of Strategic Planning is

- To bring an organization into balance with the external environment and to maintain the balance over time (Sackett, Jones, and Erdley, 2005).

1. S.W.O.T. Analysis encourages the collection and research of specific data that has been sorted into four manageable categories:

- Strengths
 - Weaknesses
 - Opportunities
 - Threats
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Strengths and Weaknesses stem from factors within the system.

Opportunities and Threats arise from external factors that affect the system.

What is our unique selling point?

Do we have exclusive relationships with our consumers?

Do we have a well known product or outcome?



How extensive is our network?

Does our facility or location give us a competitive edge?

What complaints do we frequently hear from parents?

Are the system's technology, equipment, facility and workforce outdated?

Is the system's location and/or physical layout sufficient for growth and expansion?



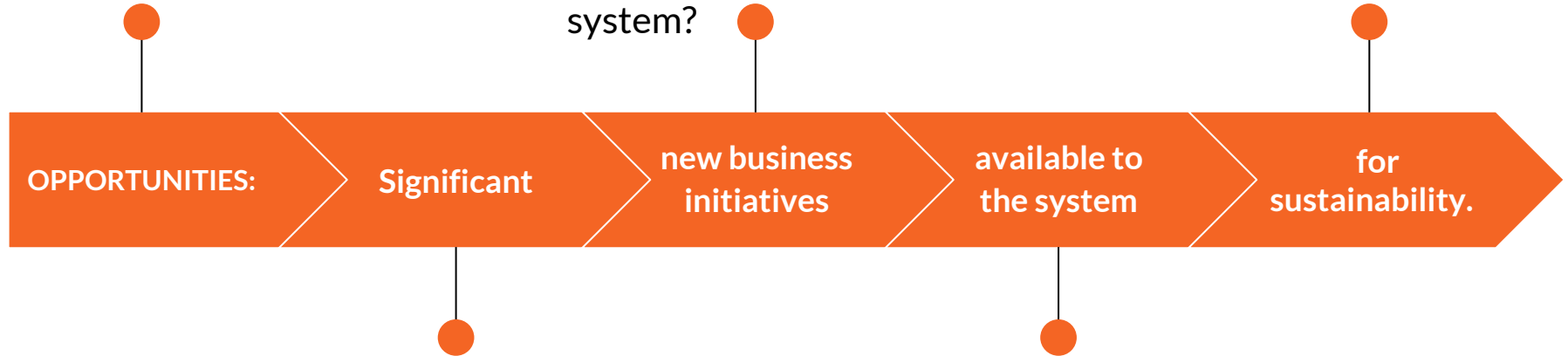
Does the system have difficulty accessing additional capital?

Is the system's distribution limited by size or capability?

Do competitors have any weaknesses the system could benefit from?

How might proposed or delayed changes to local, state or national regulations affect the system?

Is the system's target market changing in ways that could benefit the system?



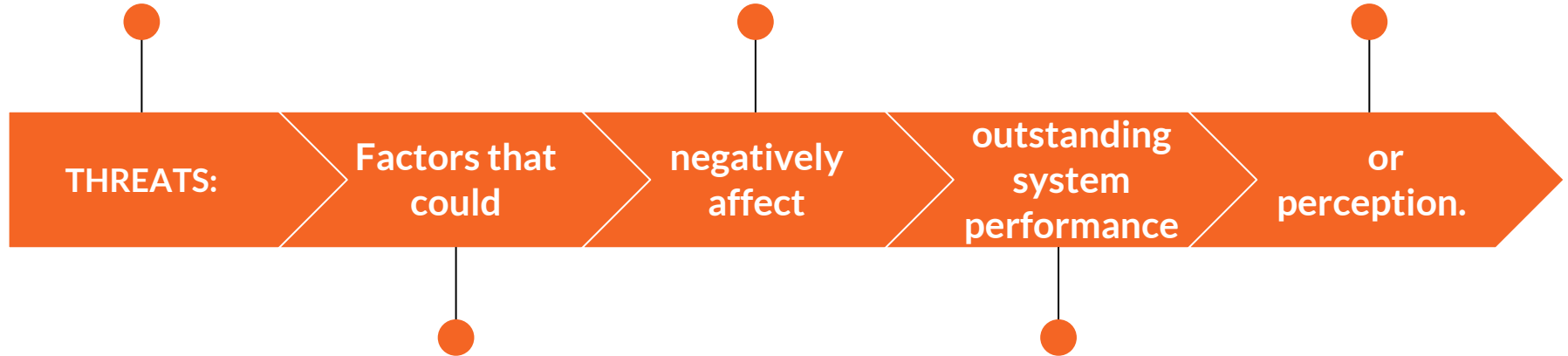
Do opportunities for geographic expansion exist?

Is there a potential niche market that the system is currently neglecting or ignoring?

Are there other schools that aren't currently direct competitors, but could be in the future?

Are there projected increases to the cost of doing business that could hurt the system?

Is our target market fleeing or shrinking?



Could changes to external financial factors such as increased cost of capital hurt the system?

Does the system rely too heavily on one big feature that could be negatively affected by changes in local, state or federal regulations?

Gap Analysis



A Gap analysis is the process of identifying the gaps you need to overcome to get from where you are now (your current state), to where you want to be, (your desired state). Identify what will need to be adopted, eliminated, changed or overcome to achieve your vision.

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PLAN:



Strategic Planning Life Cycle

PRIMARY OBJECTIVES

A primary objective is a broad statement of purpose or intent describing the end state, towards which goals and action plans are directed. Objectives provide direction, but are not specific or measurable. They are high level priorities.

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PLAN:



Strategic Planning Life Cycle

SMART GOALS

Smart Goals differ from primary objectives in the sense that they are specific and measurable.

S: Specific (Who, What, How)

M: Measurable (How much, How many, How will we know when it will be accomplished?)

A: Attainable (Do we have necessary resources? Can we obtain them?)

R: Relevant (Why is this important? How does it align to strategy?)

T: Time Bound (Is a clearly defined time frame, including a deadline, developed?)

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PLAN:



Strategic Planning Life Cycle

ACTION PLANNING

Action plans should reflect the tasks associated with SMART Goals.

Action plans include:

- Specific activities
- Responsibility levels
- Time frames
- Outcomes

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EXECUTE



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EXECUTE

It is not enough to write the plan. The plan must be implemented.

Everyone in the organization needs to know the plan, where to find it, how it affects him or her, and what objectives they personally impact.

Revisit the vision and mission statements. Do they still reflect our needs and future desires as a system?

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EVALUATE



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EVALUATE

Periodic evaluating helps an organization to review what has been written, to find out what works and what is not working and to subsequently correct it.

- Review action plans regularly at Board Meetings
- Decide how often relevant individuals should meet to review status
- Rethink goals and use of valuable resources if something is not working, and consider alternate plans



Thank you for your time
and committment to the
City of Cape Coral Charter
School Authority
