

Strategic Planning Best Practices

Strategic planning has been around for a long time, with its roots in the military and business. However, over the last several years strategic planning has been embraced by much of the public sector. For such a longstanding and broadly applied discipline, it would be expected that an abundance of literature exists on strategic planning, and this is indeed the case.

Although not an exhaustive list, the attached references are representative of the available literature and contain a significant amount of useful information. If one thing can be gleaned from these sources, it is that there is no universal approach or standard template for developing a strategic plan. However, comparatively there is still considerable common ground among these sources as to best practices in the strategic planning process:

- Prepare to plan – develop a “plan for the plan”
- Research what other organizations are doing well
- Conduct an environmental scan – research data, identify trends and challenges, and analyze organizational strengths, weaknesses, opportunities, and threats (SWOT)
- Identify all stakeholders and solicit meaningful input throughout the planning process – create a sense of stakeholder ownership of the plan
- Seek improvement based on assessment of needs, and challenge the organization, but within realistic parameters – create a plan that is largely accomplishable
- Develop compelling and clear vision and mission statements
- Ensure that the plan reflects a balance of organizational perspectives
- Identify proactive priorities and implementation strategies (or goals and objectives) focused on the organization’s vision and mission
- Identify performance indicators or measures for monitoring
- Develop action plans – the details of who does what by when
- Communicate the final plan to all stakeholders
- Provide progress reports on plan implementation
- Provide at least an annual review of the plan – it should not be set in stone
- Live the plan – have it available at meetings for reference, and align budgeting, operations, other planning efforts, and employee performance expectations with it
- Acknowledge success

The processes for developing and implementing the AISD Strategic Plan build squarely on these practices.

References on Strategic Planning Best Practices

The following references are not listed in any particular order:

1. *Education Criteria for Performance Excellence*. Baldrige National Quality Program, 2004.
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5. *Strategic Planning Criteria*. North Central Association, Commission on Accreditation and School Improvement.
6. *Best Practices, Report Number 3: Strategic Planning*. Community Associations Institute Research Foundation, 2001.
7. *Strategic Planning for America's Schools*. William J. Cook, Jr., Ph.D. The Cambridge Group, Revised Edition V, 2001.
8. *Strategic Planning for Public Schools*. Texas Association of School Boards, 2004.
9. *Effective Strategic Planning: Getting Your Organization Focused and Directed*. The Enterprise Foundation, 1999.
10. *Strategic Planning: What Works...and What Doesn't*. American Productivity and Quality Center, 1999.
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12. *Tips for Effective Strategic Planning*. Christine D. Keen. HR Magazine, August, 1994.
13. *Strategic Planning*. David Peterson. ERIC Digest Series, Number EA 41, 1989.
14. *Basic Guidelines for a Successful Planning Process*. Carter McNamara, Ph.D., 1999.
15. *Best Practices for Long-Term Planning*. Illah Nourbaksh, Ph.D. and Ofer Matan, Ph.D., 2002.
16. *What Makes Strategic Plans Work Well?* David T. Conley. School Administrator, December, 1994.
17. *Five Good Ideas about Strategic Planning*. James Appleyard, 2004.
18. *Model Planning Process Overview*. Washington State School System Improvement Resource Guide, 2004.