

WRITING THE STRATEGIC PLAN DOCUMENT

The following is an excerpt on **Strategic Planning** from:
Strategic Planning for Faith-based Schools

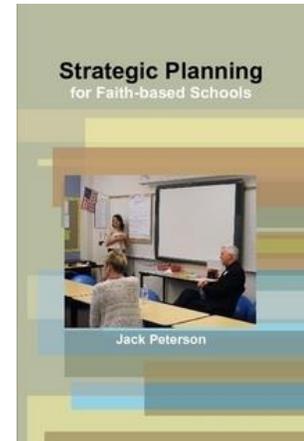
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Chapter 8: Format of the Strategic Plan Document

Once the Steering Committee has finalized the goals for the long-range Strategic Plan, it must now decide how to communicate them to the school's stakeholders. This will be done by a number of means, but anchoring all the communications about the Strategic Plan will be a document, referred to as the Long-range Strategic Plan, which captures the essentials in a readable format. To decide on the format, it is important to understand what you want the document to accomplish.

First of all you want to **inform**. Anyone reading the document should have a clear understanding of what the school intends to accomplish over the time-frame of the plan and why.

Secondly, you want to **inspire**. Anyone reading the plan document is likely to be involved in some element of the plan implementation. This is your chance to touch their imaginations and their hearts, to help them see a vision of what the school could be if they would help it accomplish its strategic goals.

Thirdly, you want it to be **read**. This is requisite to the first two. Unless the document is actually read, and referred to, it can neither inform nor inspire. To accomplish this, it must be attractive, well-written and, most important, brief.

If the funneling process is used rigorously to focus the plan, the actual document should be short. As with the Mission Statement, the shorter the document, the more likely it will be read, remembered and referred to. Brevity competes with completeness, however. Readers must be given enough context that they understand the reasons that major, strategic goals are being proposed for the school. The goals must have enough specificity that readers will be able to picture what they mean and what the school might look like when they are accomplished. Much of the detail about metrics, implementation, assignments, time-lines and data which drive the goals can be included in appendices, but the plan itself should be as streamlined as possible.

The plan should begin with a brief statement of its overall purpose, which should include a reference to the school's Mission. If the Mission Statement is a sentence or two, it can be incorporated in its entirety, which is another argument for having a very brief Mission Statement.

Example: Favre Preparatory School's mission is to give the Church and the world leaders of competence, conscience, commitment and compassion. With the increasing pace of change in that world, Favre's graduates must be prepared in ways not even conceived of just a few years ago. The Strategic Plan that follows articulates the key steps the school must take in the next ten years to produce graduates who can apply time-honored values to new and unanticipated challenges.

There should be a paragraph about the process for creating the plan, stressing how key constituencies gave their input and the process for gathering the data leading to the goals. A list of the Steering Committee, especially if they are known and respected by the school's constituencies, will be of interest to the reader as a quick confirmation of the plan's quality. For this reason and so that it doesn't weigh down the plan narrative, the committee's names and titles should be listed in a graphical side-panel.

Example: This plan is the result of a community wide process of assessing and considering responses to the challenges and opportunities facing the school. The entire community of alumni, parents, students and friends were invited to give input through a survey, to which 2,320 responded. Over 500 people were involved personally in meetings, presentations, focus groups and committees. 120 community members and outside experts served on 8 Topic Teams to evaluate various aspects of the school and make recommendations to strengthen how they support the mission. Topic Teams reviewed academics, school life, spiritual formation, personnel, technology, facilities, finances and development. Their recommendations were presented to a Steering Committee charged by the Board of Directors to identify from this process the most pressing strategic needs, set key goals and commit the school to achieving them as set out in the plan you are about to read.

The plan should include a vision of what the school will look like once the plan is fully implemented and an invitation to be part of its accomplishment.

Example: Imagine a Favre Prep preparing students of competence, conscience, commitment and compassion, as it has done throughout its history, but in ways that match the challenges of a new world. As a result of this plan, Competence for our graduates will mean, not only critical thinking skills for which Favre is well-known, but mastery of new technologies that will empower them to be leaders in a fast-changing world. Conscience will mean, not only grounding in Catholic values, but the ability to defend and apply those values in an increasingly secular culture. And Compassion will mean the ability to love, and show love for, neighbors in their own community who might otherwise be invisible, and neighbors in a global community coming closer each day. Your prayers and support of the strategic goals put forth in this plan will make that vision a reality in the next ten years.

The goal itself should be stated simply and clearly. It should articulate what the perceivable or measurable results will be. Each goal description should begin a few sentences showing why it is important to accomplishing the Mission and responding to trends faced by the school.

Example: The school cannot produce graduates of competence, conscience and compassion if it becomes an enclave of a privileged few. And yet trends in the cost of education could lead to just that scenario unless the school provides relief to families struggling with the cost of tuition. Therefore, over the next ten years, the school will increase its endowment fund to provide enough financial aid to meet the demonstrated need of all admitted students. This will require a multi-year fundraising effort to raise an additional \$15 million in endowments.

Completing the plan document is a wonderful marketing and communications opportunity. Once it is written, it should be distributed to the school's stakeholders in a variety of venues. Most common is preparing a compelling, graphically designed publication of the document itself. This should include graphic elements and photos that connect it to the school's students, which is best done by a professional responsible who is for graphic design of other school publications. Additionally, the Strategic Plan should be presented by the chief administrator at meetings of various stakeholders, such as parents, alumni and benefactors, or included in some form in the school's annual report and other publications. It should be continually re-introduced and referred to over the course of the plan time-line and made available to new families as they join the school community.

A free template to assist in writing the plan document can be requested by clicking [here](#).

A 33 page, downloadable copy of the monograph, *Strategic Planning for Faith-based Schools*, can be found on the *Managing for Mission* website at www.managingformission.com, under the [RESOURCES](#) tab.