

# The Key to Success in Strategic Planning Is Communication

Effective planning, as the Tacoma, Washington, Public Schools learned firsthand, depends on regular communication with *all* parties at *all* phases of the process.

*Photograph by Leslie Miller and Lois Hart*

Recently many districts have turned to strategic planning to develop long-range plans and provide direction for their schools. The Tacoma, Washington, Public School District is one of them. During the 1988-89 school year, we initiated such a process in response to low student achievement, a high dropout rate, our district's inability to deal with the emerging issues of educational technology, and changes in top-level personnel (a new superintendent and deputy superintendent). Now, after a year of planning, we are implementing a plan which gives focus and direction to our district for the next five years.

What was the key to the success of our strategic planning? In our opinion, communication—at *each* step of the process—has been the critical element in the development of our five-year plan. In this article, we will point out communication strategies we used (or, unfortunately, did *not* use) at each step in the planning process and the results of those efforts.

## Spreading the Word about Strategic Planning

Our superintendent had been searching for a planning process that would involve the community in setting long-range direction for the schools. After hearing about strategic planning, as pro-



*Hosting an informative presentation before a group of staff or community members is one way to build enthusiasm for a district's planning process. In between presentations, written communications report progress and help maintain that early commitment.*

posed by Bill Cook,<sup>1</sup> she attended a seminar about the process in San Diego in the summer of 1988. The process impressed her, and she subsequently sent the deputy superintendent and a high school assistant principal to New York for a week of facilitator training with Bill Cook. After that training, we decided to go full speed ahead with strategic planning.

Our first communication need was immediately apparent. Strategic plan-

ning is a long and complicated process. How were we to inspire others in the district with the same enthusiasm for the process that we had? We decided to provide our administrators a detailed explanation of how strategic planning works. At their conference in August, we spent three hours describing the rationale for the process and our plans for implementation. Then we asked the principals to share this information with their staffs back

home. To assist them, we developed an attractive fold-over brochure which outlined the steps in the process, with timelines, and indicated at what stages we would be asking school faculties to participate.

In addition, our two facilitators volunteered to speak to school staffs and to parents about strategic planning—they eventually spoke to 30 different groups. For the board of education, we provided an orientation that let them know what to expect at each step along the way. We also spoke to the PTA Executive Council and asked PTA members to share with their respective memberships our vision of strategic planning for the district. Further, our communication efforts extended to the media: several of us were interviewed on a radio talk show, and the local newspaper ran an article about strategic planning.

What did we forget? We did a less-than-adequate job of communicating with the 13 unions that we deal with in Tacoma. In retrospect, we know we should have brought in at least their leaders for a presentation. Later, that lack of communication resulted in problems of support. The other group with whom we could have communicated better was our business community. The business people in our locale who did not have children in school and/or did not see the article in the local paper were not aware of our reasons for undertaking strategic planning. Some early communication with this segment of our community might have made them more receptive to our efforts.

### **Announcing the Planning Team**

According to Bill Cook's model for strategic planning, selection of a Planning Team is the next step. From among the staff, parents, and community, we needed to choose 25 well-informed, articulate people of good will who represented particular perspectives on the school district.

At this point, we were perplexed. We certainly wanted to tell the community we were selecting members for the team, but we didn't want to be deluged with volunteers. By handpick-

ing the members, we felt that we could ensure a balanced group in terms of race, gender, and position both within and outside of the organization. Ultimately we decided to ask for input about the Planning Team's membership from the Superintendent's Cabinet, but we did *not* tell citizens how they could volunteer for the team. In retrospect, perhaps we should have done so. Later we were criticized for not representing every community interest group and for not sharing the details of our selection process with the entire community. These criticisms, however, did not extend to the individuals we had named to the Planning Team—they were highly respected by their peers.

### **Presenting the Work of the Planning Team**

During a two-day meeting in October, the Planning Team developed a set of belief statements, a mission statement, objectives, and 15 strategies for the district. Our communication of this work to the community was probably the strongest point in our process. Team members made more than 85 presentations of their work to school staffs and community groups. Every school hosted at least one presentation; and some had two, one for staff and one for parents. We presented our plans to service clubs, business groups, unions, the board of educa-

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tion, retired teachers—to any group that would allow us to speak. The presentations varied in length from 20 minutes to two and one-half hours, depending on the amount of time the group provided, but the basics were the same for each audience.

In addition to sharing the work of the planning team, we asked our audiences to be a part of the next step in the process: the formation of Action Teams. As a result of that intensive communication, and as evidence of its success, more than 420 people—staff, parents, students, and community—volunteered to be members of the new teams.

### **Reporting the Progress of the Action Teams**

From November through March, the Action Teams developed plans that would ensure accomplishment of each of the 15 strategies. It was essential to the success of the process, we felt, that communication not lag during this period. To keep interest high in the teams' efforts, we reported on their progress in various ways:

- We kept staff members informed via our Staff Bulletin and a bimonthly flier, the "Action Team Update."
- The deputy superintendent made a progress report at every board meeting; she updated staff and parents on the teams' work during her visits to schools.
- Principals included information about the Action Teams in their newsletters for parents.
- Once a week, Action Team leaders met individually with the internal facilitators to discuss the work of their teams.

### **Communicating Too Little, Too Late**

In April the Planning Team met again for two days to review the plans of the Action Teams and either accept them, reject them, or send them back for clarification. During April and May, the Action Teams clarified the plans that had been returned for further details. Then, in early June the Planning Team met again to make a final decision about the disposition of the plans.

It was about this time, when the Planning Team had decided to recommend



the total Strategic Plan to the board, that we realized how little we had communicated with staff and community during the previous few months. To compound matters, we had scheduled only two hours for the board presentation—not nearly enough time to answer their many questions. One aspect of the Strategic Plan, the “Schools of Choice” strategy, immediately drew fire from the board and then from the community. The plan called for changing the district’s present desegregation plan to include enrollment lids of no more than 70 percent majority and 30 percent minority at every school. Although the planners intended this as a goal of the plan toward which the district would be working, the community interpreted it as a major extension of forced busing.

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Then, too, the timing of the completion and presentation of the overall plan, in terms of our ability to communicate with the community, was poor. School was already out—we couldn’t send progress reports home to parents with students—so the superintendent directed a special mailing to every parent in the district explaining the Schools of Choice strategy. This, unfortunately, did not allay everyone’s fears.

Subsequently, the board scheduled three public hearings during June and July to answer questions and provide the citizens an opportunity to express their reservations or concerns. Schools of Choice was only one of 15 strategies, but it was the one on which the public focused. When the media printed arti-

cles that distorted the impact of the Schools of Choice strategy, support for the plan suffered further.

The superintendent then met with the editors of the newspaper to ask them to print an article that would defuse the growing hysteria in the community. The editors did so, but they also ran an editorial chastising the district for not communicating the details of the Schools of Choice strategy. We probably could have avoided this unfortunate situation had we anticipated the public’s fears and communicated with them better.

### **Still Spreading the Word**

In July 1989, the board accepted the Strategic Plan, with the exception of the Schools of Choice strategy, which was referred to a separate task force for further study. The 14 accepted strategies are presently being implemented. The Action Plans for these strategies have resulted in improvements in student achievement, extended efforts to expand school/business partnerships, a decrease in gang violence and substance abuse, and a system of regular evaluation of district programs and services. Not all Action Plans are in place, but there is a timeline for doing this within our five-year period.

We are acutely conscious that regular communication is a continuing need. We feel indebted to the 420 volunteers, who expended a tremendous amount of time and energy in developing the Action Plans; it is imperative that we keep in close touch with them about our progress in implementing the plans. To do this, we have developed a process of quarterly reviews of each Action Plan. The review process calls for an individual meeting between each department head assigned overall responsibility for an Action Plan and either the superintendent or the deputy superintendent. At these meetings, they discuss each plan, noting progress toward its fulfillment and any barriers to completion. The superintendent or deputy assist in removing these barriers. After each review, we report progress in the Staff Bulletin.

The community newsletter, published quarterly, provides a vehicle for

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letting Action Team members know where we are on all of the Action Plans. The annual report, mailed to all district community members, is another means of providing progress updates. We have also communicated by letter with every Action Team member regarding our specific progress on their team’s plans and have received a positive response to these efforts. In addition, we have initiated an annual update process with the Planning Team. After our first annual update, we distributed a newsletter to the staff and community describing proposed changes in the Strategic Plan.

As we reflect on our experiences, it is evident that communication has been the key to our success and that lack of communication has been the root of our failures. Since strategic planning can have a powerful effect on a district’s future and its use of resources, district leaders must anticipate the need for extensive communication with all segments of the community at every stage of strategic planning. We’ve offered our experiences here so that perhaps you can avoid the pitfalls we encountered and travel a smoother road to successful planning and the benefits it brings. □

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