

Teton County School District #401
Minutes of a Strategic Planning Training
District Office
Monday, August 16, 2016 – 8:30 AM

Members Present:

Delwyn Jensen, Chair
Chris Isaacson, Vice Chair
Shelley Streit
Nan Pugh
Ben Kearsley
Monte Woolstenhulme, Superintendent
Becca Berry, Clerk

Excused:

Delwyn thanked Richard Hunter for his willingness to assist the Board in this effort. Richard works with large companies and organizations to develop strategic plans.

Richard looked at the Board's strategy documents—there is a lot of stuff. He is hoping his assistance will help the Board develop a clear strategic plan. It needs to have structure and it needs to be easily communicated to staff and the public. He is here to help create a straight line—not change the content. Strategy sets the direction.

He used the following to help develop a plan: OGSIM.

Objectives-I want to be more healthy (general)

Goals-time bound description-I want to bench press 20 pounds by 2016 (specific, time-bound, quantitative)

Strategy-3 statements/sentences/clear or less-statement of strategy is simple and straight forward. (simple, path)

Initiatives-Strategic Plan-Projects to get you to the goal. (what we do)

Metrics –numbers use to see if making right progress/met goal. (tells if making progress)

In the Board's current documents, he sees a mix of objectives and goals, the strategy is veg, and initiatives are mixed in.

Richard: An objective is a state. Goal is a state with a number and a date. Strategy has a verb in there. Initiatives have a verb, date, quantity. Metrics is all numbers.

Shelley noted that the Board has their “goal areas” but they are not goals. Richard agreed, they are objectives. He explained that there will have to be lots of initiatives and choices made to determine which initiatives get the Board closest to their goal.

Nan asked where the line is when the Board starts micromanaging. Richard explained that the Board can set objectives, goals, and strategies. The Board getting down into the initiatives would be micromanaging.

Richard thinks that the Board's “goal areas” look like good objectives. You do not want more than a handful of objectives. Covey did a study on objectives and from that study it was

determined: 1-3 achieve all. 4-6 achieve 1-2 of them. If have more than that, you don't achieve any.

Richard mentioned that if the Board can set clear goals and strategies, then it will really help the organization know what to do.

Looking at the Board's work, Delwyn thinks the Board has problems quantifying goals. Richard reviewed the three basic classes of metrics: operational, financial, and perceptual. Operational metrics are leading indicators to financial metrics. Perceptual is engagement; for example it could be a measure of customer loyalty, which are leading indicators for other outcomes. Engaged employees produce better stuff. High level of customer loyalty gives us higher profitability. Parent engagement is a leading indicator for a number of outcomes you desire. Not all metrics should be financial metrics. Use the other two metrics as leading indicators. Metrics need a baseline; a place to start from.

Environmental Scans are beneficial-what are the characteristics of the area we are in?

Richard asked, where do you think you do the prioritization? At Goals. Need to have fewer goals than initiatives. Prioritizing goals will tell people which initiatives are most important.

Delwyn noted that for Monte's evaluation the Board prioritized the objective areas; we should follow that order in the strategic plan.

Strategies are less numerous than goals. More initiatives than goals. Goals should be driving the strategies.

Success with data is knowing what you want to know.

The Board needs to create goals; they will need to make an educated guess as far as the measurement part of the goal. Initiatives are a hypothesis. Base the goals on objectives.

The Board needs to develop goals for each area. Then they need to develop strategies. Each school level would have the same overarching goals, just expressed a little differently. Initiatives need to be very specific. Richard explained that when someone wants to learn to play the piano, they can't play all the notes at the same time. The board wants the best for the district, but you can't learn/do it all at once.

Chris noted that the Board documents can be used as the environmental scans.

Ben noted that in World War II, one of United States' goals was to take over Japan. They solicited ideas that came from the people on the ground. When those ideas come in, they can be filtered. The strategic plan needs to have a specific goal; when the people on the ground know that goal, they can bring initiatives to the Board and the Board can filter those initiatives.

Richard reminded the board that it is really hard to make something perfect on the first try. He suggested not putting stuff in cement too soon; see if things will work and if they won't, tweak them. Work on it and overtime you will get better. Practice this more than once a year—meet quarterly and review the Strategic Plan.

The Board and Richard looked through the draft document the Board has created.

MAP should be part of the plan. Improving teachers should be a goal under student achievement.

Create something that can be easily communicated. Fewer goals, the easier it will be to explain, this is how we get to that. More compact, easier to communicate what the initiative is leading to (in terms of goals).

The two goals under student achievement will be teacher excellence and student achievement.

Objectives move the least, then goals, then strategies, and then initiatives. To determine the difference between initiative and strategies one might ask, do I assign this to someone or is this something everyone can do?

Break

Richard encouraged the Board to start doing quarterly sessions. It should start with quick modifications of goals and strategies, and then they should dive into initiatives.

Richard would like the Board to remind the admin team of the objectives. Explain the goals. Repeat the strategies. Start with the outcomes NOT the initiatives. Where can we give you more help? Where is it not working? Direction from top down, feedback comes from bottom up.

Ben would like to make sure the admin know they are always invited to come to Board meeting to give feedback on this.

Whenever there is a change, people feel stressed. Even if the change is desired. Stress turns into resistance. Get as much feedback as possible as to where there is resistance.

Chris asked Richard what the board should do if teachers are saying the change or new thing is bad but the admin team says it is good. Surveys might be good. It is important to note who is resisting. Do other teachers take their lead? Or is it someone that always complains and no one really cares. Draw up a power map, this will help you gauge support within the organization. How much influence might this person have on a specific topic? Who has power where the issue is concerned, and who are they influencing? Knowing the power map will help you develop a strategy of how to address the issue. What will move people who have significant influence? If it comes down to it, you may have to reassign if people if they don't want to get with the program.

With facilities, Richard recommend creating a list of questions that you want answers to but do not currently have. Data that is not helping answer a questions is not useful data.

There is a strategy hiding behind the "safety goals" which are initiatives. Perceptual metric might be useful with measuring safety. How do you know if people feel "safer"? Have you been bullied in the last few months at school? The goal will help figure out the value that needs to be produced. What would be success? Measures are about the status of how things are working. Risk management is never measured by outcome.

One goal in fiscal responsibility is staying within the budget. Richard did not understand why that would be part of the strategic plan; it is a run of the business kind of thing. He suggested

revisiting the goals in fiscal responsibility as most of the goals listed are things that have to happen. What is the outcome desired from fiscal responsibility?

If the Board would like more help, let him know and they can get together again. Delwyn noted that the Board needs to go through their document and make goals under each objective. The Board will develop goals and shoot them to Richard for his review and suggestion.

Richard told the Board to keep these questions in mind when they revisit the strategic plan: What matters? How it matters? What you are going to do about it?

The Board will come to the Emergency Levy meeting with goals drafted and ready to decide.

Nan motioned to adjourn the meeting. Shelley seconded. Passed 5-0.