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NHSBA School Board Strategic Planning and Goal Setting Workshop

I. Introduction to strategic planning:

1. What is strategic planning?
 - General definition: A plan to reach specific goals or outcomes that outlines benchmarks towards achieving those goals or outcomes.
 - Strategic planning is a process by which a group gathers information in order to ensure that initiatives and priorities are established and carried out.

2. Initial questions for the board to consider:
 - What does the district already have in place to facilitate the initial steps of strategic planning?
 - Who will be involved in the strategic planning process?

3. Strategic planning must include or create a sense of agreement regarding the goals of the school district with respect to the various elements and constituencies involved.
 - This does not mean that all people have to be in complete agreement about every goal.
 - Rather, the process must involve reaching common ground on the district's most pressing needs.

4. Key terms to become familiar with:

- Goals
- Objectives
- Strategies
- Tactics
- Performance
- Outcomes
- Benchmarks
- Measurable

II. School Board Self-Evaluation

1. Has the board conducted a self-evaluation?
 - If so, have goals in relation to the evaluation been established?
 - Has the board identified areas of strength and areas in need of improvement?
 - What can the board learn from its areas of strength? What does the board do effectively and how can those practices translate to a strategic planning initiative?

2. Primary purposes of school board self-evaluation:
 - To assist itself in clarifying the district's goals and direction.
 - To identify effective aspects of board performance.
 - To effectively plan for the learning opportunities for students.
 - To address areas that are in need of improvement.
 - To work towards the achieving the goals that were established through a goal-setting process.

3. Evaluation As A Planning Tool:
 - Treat the board's evaluation as an extension of the district planning process.
 - Attaching the board's/district's goals to the strategic plan or goal-setting ensures that the main emphasis is achieving those goals.
 - Have the goals been achieved? If not, how did the board's performance affect progress on the goal? If so, what led to those successes?
 - Was the board's effort on the goal satisfactory? Did the board complete all the tasks assigned to it during the goal-setting process? If not, why?

4. Process for Beginning School Board Evaluation:

(A) Identify key goals – keep those in mind – what does the board want to achieve? What are the Board’s key responsibilities, per policy, DOE Rules, statute, and the district’s goal-setting and strategic planning?

(B) How to Identify of Areas for Assessment:

- Preliminary deliberations provide the basis for an informed decision by the board as to what aspects of its performance should be assessed.
- Has the board done goal-setting? Does the board have comprehensive goals in place? Has the board, through goal-setting, determined what its tasks and responsibilities are?
- The decision as to what to assess should be guided by a careful analysis of the needs of the board, but it should also be influenced by the time available for the board to do an adequate job. The tendency to undertake too much is to be avoided.
- Just as with goal-setting, the board may identify certain areas of its self-assessment that it believes warrants initial discussion and review.

(C) Board discussion and interpretation:

- Major strengths of the board within each area of discussion.
- Priorities for board improvement.
- What is a school board’s primary function? What general topics do those functions relate to? What has the board identified as its primary tasks in relation to its goal-setting?

5. What Areas Does the School Board Need to Address?

- Relationship with the Superintendent
- Community Relationships
- Effective Board Meetings
- Staff and Personnel Relationships
- Relationship to Instructional Program
- Relationship to Financial Management of Schools
- Policy Development
- Risk Management

III. Strategic Planning and Goal Setting

1. Key Questions:
 - Where are we today? What is the current state of our school?
 - Where do we want to be tomorrow? What is our strategy for moving forward?
 - How does the board identify goals?

2. Determine the goals to be addressed:
 - This can only occur after a thorough evaluation of the issues listed above and an analysis of the current state of the school district.
 - What is the strategy to achieve that goal?
 - Who is responsible for working towards that specific goal? The board? Administration? Teachers?
 - Be sure to differentiate between school board goals and school district goals!
 - Board goals should relate to board operations and objectives that rest solely with the school board.
 - School district goals should be more encompassing and relate to the district in a broader sense.
 - There may be some overlap.

3. What does the school district already have in place to facilitate the initial steps of strategic planning?
 - Mission statement?
 - School board policies?
 - District-wide surveys?
 - Other data? Test scores, academic assessment results, demographics, economic factors, etc.
 - Use of this information will assist the school board in identifying where the board currently is and where the board wants to be or what it wants to achieve.

4. Who will be involved in the strategic planning process?

- The school board
- Administration
- Teachers
- Parents/community members
- Other stakeholders?

IV. Sample Concept for Goal Setting – SMART Goals

1. Very common technique/practice used in a variety of settings – schools, corporations, non-profit organizations, etc.

2. SMART =

- Strategic/specific
- Measurable
- Achievable
- Relevant
- Timeline/timely

3. Explanation:

(1) Strategic Goals

- The school board's goal should have its expected outcome stated as simply, concisely and explicitly as possible.
- Goals should be straightforward and emphasize what you want to happen.
- This answers questions such as: how much, for whom, for what? What does the board hope to accomplish by setting this goal? What is the board going to do to accomplish this goal?

(2) Measurable Goals:

- Tangible evidence that you have accomplished the goal. Usually, the entire goal statement is a measure for the project, but there are usually several short-term or smaller measurements built into the goal. A measurable goal has an outcome that can be assessed and/or measured in some way.
- If you can't measure it, you can't manage it!
- Example: The district wants to improve its math scores by 10% within two years.
- As opposed to: The districts wants to students to be better at math.
- Establish concrete criteria for measuring progress toward the attainment of each goal you set.

(3) Achievable/Attainable Goals

- An attainable goal has an outcome that is realistic given the current situation, resources and time available.
- Goal achievement may be more of a “stretch” if the outcome is tough or there is a weak starting position.

(4) Relevant and Realistic Goals

- Will this goal lead to the desired results of the organization?
- Your goal should fall in line with the School Board Mission, and focus on outcomes.

(5) Timeline/timely

- A time-bound goal includes realistic timeframes. Sometimes timeframes are imposed. When that is the case, carefully consider what is attainable within the imposed timeframe.

4. Prioritizing Goals within the Strategic Plan

- Considerations of time, effort, finances, staff availability, etc.
- Which goals relate to requirements in state or federal law?
- Which goals need immediate addressing?
- Which goals does the district have the financial capabilities to address?
- What are reasonable benchmarks for implementation of each goal?
- Which goals or priorities have the most consensus or agreement among the board or strategic planning committee?
- Start small or address the biggest needs first?

New Hampshire School Board Association
Sample Policy BA
SCHOOL BOARD SELF-EVALUATION AND GOAL SETTING

Category: Recommended

The Board will attempt to conduct an annual self-evaluation. Co-extensive with the Board's self-evaluation, the Board will attempt to establish annual goals and objectives. The Board believes that establishing annual goals and objectives will serve as a benchmark and criteria for the annual self-evaluation.

The following areas of Board operations and relationships are representative of those in which objectives may be set and progress appraised:

1. Relationship with the Superintendent
2. Community relations
3. Board meetings
4. Staff and Personnel Relationships
5. Relationship to Instructional Program
6. Financial Management of Schools
7. Policy development
8. Risk management
9. Other areas the Board determines should be evaluated

While the board may decide to do so, it is not expected that every area listed above will necessarily be annually reviewed.

The Board desires that the annual self-evaluation and goal setting will clarify the Board's role within the school community, address areas for the Board to improve, and address areas for which the Board should be commended.

Legal References:

NH Code of Administrative Rules, Section ED. 303.01 (g), Substantive Duties of School Boards

NHSBA Sample Appendix: BA-R1; BA-R2

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