

Missoula County Public Schools

Developing a Knowledge-Based Strategic Governance Structure

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Strategic Planning, What is the Purpose?

“The fundamental distinguishing dynamic of enduring great organizations is that they preserve a cherished core ideology while simultaneously stimulating progress and change in everything that is not part of the core ideology.”

Jim Collins, Author of Good to Great and Built to Last



Strategic Planning -- Why Is it Necessary?

1. *Planning helps establish clarity and consensus regarding the direction(s) of the Missoula County Public Schools.*
2. *Planning helps ensure open access to critical information by the entire community and helps broaden the number of people truly invested in the district's success.*
3. *Planning helps the district identify and overcome barriers to success.*



The Board's Responsibilities

1. *Set the direction of the District;*
2. *Provide the necessary resources to move in the direction set by the District; and*
3. *Oversight.*



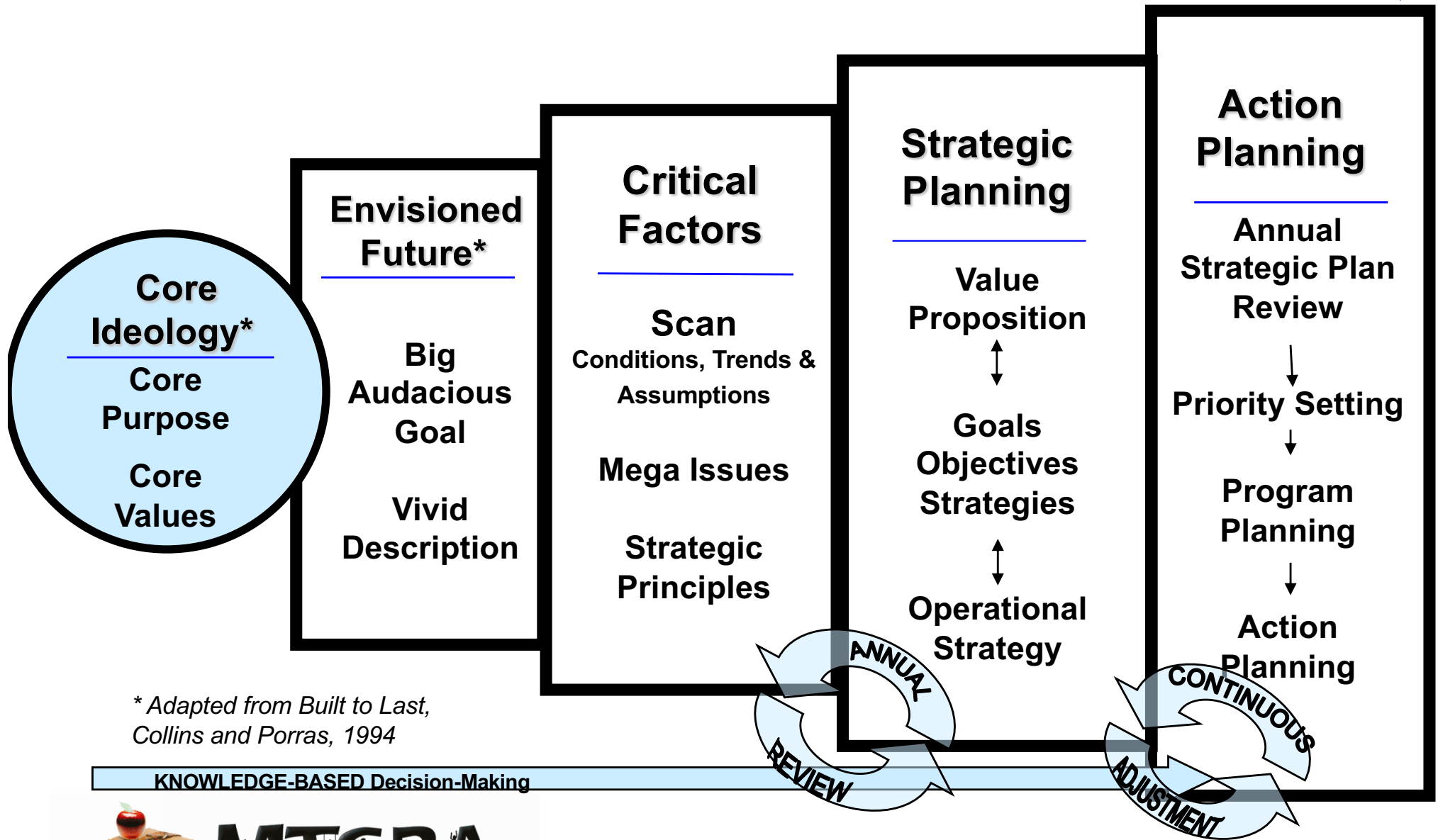
Strategic Planning by Schools and their Communities: What Does it Take?

- *A collaborative, visionary approach*
- *Participation and buy in by as many people as possible*
- *A commitment to follow through on and use the resulting plan to guide decisions, even when those decisions are difficult.*
- *A commitment to regularly revisit and refine strategy as a continued, evolutionary process in the district. Implies continued investment in the philosophy of continuous improvement and strategic governance.*



Five Planning Horizons

Timeless 30 years 20 10 5 3 2 1 year →



The Order of Strategic Planning

Identity First

Core Purpose & Core Values

Who are we?

Direction Second

Big Audacious Goal

Where are we going ?

Three to Five Year Plan Goals & Objectives

Activities Third

Strategies

What are we doing?

Actions

Who will do what?



Essential Components of Knowledge-Based Strategic Governance

- Strategic Planning From the Timeless to Today
- Commitment to Norms of Governing Behavior
- Dialogue and Deliberation, Informed by Knowledge-Based Decision Making



Mega Issue Dialogue

Assess &/or Adjust Strategy

Policy: Public &/or Operational

Routine Business

The Strategic Board's Agenda



Preserve the Core – Stimulate Progress and Change in Everything Else



Discovering Your Core Ideology

- Every district has a Core Ideology, consisting of the Core Purpose and the Core Values.
- The Core Ideology is not selected, it is discovered. The stated ideology should not be an unattained goal or aspiration but should speak to values that are firmly held at this time.



Core Ideology = Core Purpose + Core Values

- **Core purpose** is the district's fundamental reason for being. An effective purpose reflects the importance people attach to the district's work—it taps their idealistic motivations—and gets at the deeper reasons for a particular district's existence.



Core Purpose Exercise

The Core Purpose of Missoula County
Public Schools is



Core Purpose - Criteria

YES	NO	Do you find this purpose personally inspiring?
YES	NO	Can you envision this purpose being as valid 100 years from now as it is today?
YES	NO	Does the purpose help you think expansively about the long-term possibilities and range of activities the district can consider over the next 100 years, beyond its current services, markets, industries, and strategies? (For example, Disney's purpose to make people happy helped propel the company from its initial strategy of cartoons into full-length feature animation, the Mickey Mouse Club, Disneyland, EPCOT Center, and so on.)
YES	NO	Does the purpose help you to decide what activities to <i>not</i> pursue, to eliminate from consideration?
YES	NO	Is this purpose <i>authentic</i> —something true to what the district is all about—not merely words on paper that “sound nice”?
YES	NO	Would this purpose be greeted with enthusiasm rather than cynicism by a broad base of people in the district?
YES	NO	When telling your children and/or other loved ones about your involvement with Missoula County Public Schools, would you feel proud in describing your work in terms of this purpose?

Core Ideology = Core Purpose + Core Values

- **Core values** are the district's essential and enduring tenets—a small set of timeless guiding principles or behavioral characteristics that require no external justification; they have *intrinsic* value and importance to those inside the district.
- Core values articulate how we conduct ourselves as we pursue our Core Purpose



Core Values Exercise

- Consistent with the Core Purpose identify no more than 5 Core Values that are consistent with the themes identified in the Core Purpose discussion.



Core Values Exercise

The Core Values of Missoula County Public Schools are



Testing Your Core Values

YES	NO	If you were to start a new organization, would you build it around this core value <i>regardless</i> of the industry?
YES	NO	Would you want your organization to continue to stand for this core value 100 years into the future, no matter what changes occur in the outside world?
YES	NO	Would you want your organization to hold this core value, even if at some point in time it became a competitive disadvantage—even if in some instances the environment penalized the organization for living this core value?
YES	NO	Do you believe that those who do not share this core value—those who breach it consistently—simply do not belong in your organization?
YES	NO	Would you personally continue to hold this core value even if you were not rewarded for holding it?
YES	NO	Would you change jobs before giving up this core value?
YES	NO	If you awoke tomorrow with more than enough money to retire comfortably for the rest of your life, would you continue to apply this core value to your productive activities?



Envisioned Future Exercise

- Building the envisioned future requires both a **Big Audacious Goal**, providing an overall description of the intended description of the world as changed by Missoula County Public Schools efforts and **vivid descriptions of success**.
- The envisioned future needs to be bold, yet believable and reachable, but only as a tough stretch, requiring a immense amount of efforts and a good dose of good luck.
- Think of taking the resources you have at hand, consistent with your Core Purpose and Core Values, and applying those resources to the best of your collective abilities to improve the provision of services to children enrolled in Missoula County Public Schools over the next 10-15 years.



A Big Audacious Goal

- **Five criteria of a good Big Audacious Goal:**
 - Are set with an understanding of how we will apply our limited resources to better the world in which we function.
 - Fit squarely in the three circles of our Hedgehog Concept.
 - Have an extended time frame—10 to 15 years.
 - Should be clear, compelling and easy to grasp.
 - Directly reflect our core values and core purpose.



Envisioned Future Exercise

- Using a 10-15 year planning horizon, identify the changes in the district, the community, even the world, that you want to see as a result of your programs and services.
 - The Big Audacious Goal must be consistent with the Core Purpose and Core Values previously identified.
 - The Big Audacious Goal should be supported by vivid descriptions of what it will be like to experience the success sought.
 - Note: The more specific the descriptions are, the easier it will be for the community to understand where the District is attempting to go with its programs and services and to provide meaningful feedback on the intended direction before finalized.



Envisioned Future – Finding Focus

To help inform and provide focus to your exercise, consider using the following scenario:

The date is 2030. You have now served the District, either as an employee or as a trustee, for the last 10+ years. Tonight is your last board meeting and the local newspaper is running a story describing the school district as you hope it to be as a result of the investment of the next 10+ years of your life in improving it. Draft the best possible description of the district if everyone works together in pursuit of continuous improvement in service, effectively, consistently and efficiently, focused on the interests of children, enjoying the benefit of some good luck along the way.

Examples of areas to address in your description include:

- First and Foremost, the Impact on Children
- The Most valued Benefits, Products and Services
- Delivery Systems
- Governance Structure
- Culture
- Recognition and Esteem Among Colleagues and the Public



Mega Trends Analysis

Scanning the Horizon

Scanning the Horizon: Identification of Strategic Assumptions Regarding the Future and Development of Mega Issues

- Demographics
- Business / Economic Climate
- Legislation / Regulation
- Technology / Science
- Politics / Social Values



3-5 Year Goals and 1-2 Year Strategic Objectives

- Identification of 3-5 year broad-based goal areas
- Identification of 1-2 year strategic objectives
 - Priorities and will require the Board's and Staff's attention
 - Action Plans identifying activities/events, who is responsible and target dates for completion/implementation

