

# Speed Up the Strategic Planning Process

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Independent schools are charged with meeting a complex set of goals in an increasingly complicated world. Providing an environment in which students can attain academic excellence and excel in the creative arts and athletics remains of paramount importance, so keeping up with educational best practices as well as new education and technology shifts is essential. But as cities and neighborhoods change demographically, schools today are also increasingly focused on the sustainability of their business model and actively considering what steps need to be taken to assure healthy and viable futures.

Planning for the future has never been more important or necessary. Boards of school and their finance committees struggle with how high tuition can go. Academic leaders ask, “What are the skills that our students need for the future?” Increasingly, given the pressures of the times, courageous actions are needed.

## **Try Not To Be Too Clever**

Albert Einstein once had an exchange with a fellow physicist centered on the necessity of taking bold steps. In speaking with his colleague, Einstein encouraged the younger scientist to get over his inner restriction and try not to be “too clever.” Einstein had faith that the burgeoning engineer should get on with the work at hand, should act more quickly and thereby be of greater help in addressing a major issue in physics—the world needed fast action and quick thinking. The student replied that he would do his best to put aside these inner restrictions and try not to be too clever, but he also admitted that he did not want to look stupid.

The young physicist needed to move beyond inner restrictions (concerns that prevent us from acting) and stop worrying about being too clever (the pressure of having to get every decision right). Likewise, schools should consider adopting a planning cycle that allows for the setting of priorities on a more timely, realistic and relevant basis.

Just as other businesses have sped up their planning cycles, independent schools need to be more attuned to changes in society and culture. We are being good models for our students as 21st century learners when we pay close attention to shifts in global issues, changes in technology, and

new initiatives in society. By adopting a more realistic and time-sensitive schedule, the strategic objectives for the school can be kept fresh and the school can remain open to transformational influences and changes in the world. And as far as the chances of looking stupid, while there is always some risk with innovation, there is also the great chance for significant progress and exciting discovery.

### **Avoid Unattainable Goals**

We all want to take steps that move our schools ahead while maintaining a secure and stable presence. While trying to meet these goals it is not uncommon for schools to become rooted when faced with multiple choices for action. Leaders become weighed down by what seem to be overwhelming considerations: What is the right course? What are the long-term social and financial ramifications? What will future stakeholders think of the steps taken?

Independent schools by nature are cautious and conservative organizations; we work with children and want to do no harm. So, being vigilant, schools have often undertaken far-reaching strategic planning processes that look to involve members of every constituency and inevitably address a complete menu of objectives: financial health, faculty development, admissions, program initiatives, fundraising, and improvement of facilities. The planning process can take months, involve hundreds of individuals, and look five or more years into the future. What schools often wind up with are strategic plans with noble but often unattainable goals that cover the entire range of a school's operations. And as many of us have experienced, what can often happen to these daunting plans is that they wind up on a shelf and the school may be left with a feeling of not having accomplished the work at hand.

In fairness to our schools, while these in-depth and comprehensive strategic plans are well-intentioned, they are almost impossible to achieve given the natural time constraints of the school year and the unanticipated and pressing objectives that arise during the normal course of business of running the school. It takes a sustained level of effort to attend to operating a successful, fully functioning school. School leaders know that it is the job every year to constantly be strengthening academics, focusing efforts on faculty recruitment, growing healthy admissions, and providing facilities that support the program—this is the essential, ongoing and continuing work of the school and its leaders.

### **Pose the Right Questions**

How best to frame and address the challenges that face our schools? Just as good teachers pose essential questions in their classrooms to motivate

students to use their knowledge and experiences to address real problems, the leaders in the school (head, trustees and senior staff) should pose essential questions and ask where the pressing needs are and what needs to be done to accomplish these tasks.

Shaping the planning process through working to answer these essential questions should identify a smaller number of high-priority initiatives. The strategic planning process can be strengthened and shortened if the school considers addressing, at a maximum, the two or three major, new objectives that arise when answering the essential questions. The commitment is then to meet these new objectives over a time period that is then fixed and much more achievable. Approaching strategic planning in this concentrated manner results in addressing two or three major projects over a period of perhaps two years. This method of planning becomes most effective when the school commits to a new cycle after the successful completion of an initial round. Addressing the major issues and repeating the process can become self-perpetuating and a new part of the school culture.

In shortening and tightening the planning process, schools should not be concerned that the path going forward will not be inclusive of different constituencies. Once the work of identifying needs is done, an essential step is to seek out those in the broader community who can help with the solutions. When attempting to address the sustainability of rising tuition and the tests that presents, the school needs to enlist those community members with financial and economic expertise; questions on admissions and marketing require expertise on communications; and in looking at facilities, architects, developers and those with real estate experience will need to be consulted.

### **Identify and Address Specific Needs**

My school recently undertook a strategic planning process to plan for expanded science and engineering spaces. The need for new and improved labs was identified by working with teachers and administrators from different divisions. In order to push this work forward the request for improved space was brought to the board of trustees, which formed a task force that pulled in parents with science experience, engaged architects and designers, and hired special consultants to address construction. The need was identified, a plan was formed, financing was considered, and because this was done in a spiraling manner it also built the knowledge and wherewithal to support the necessary fundraising. All of this might appear to be a bit backward from the traditional strategic planning process, but the required checkpoints have been met, and in a focused and timely

manner. The goal has been to move the school forward in the most efficient and expeditious way possible.

When trustees are attuned to their school's educational leaders and listen to the academic staff, they will not be grabbing at the latest fad in education, but seriously confronting the specific challenges faced by their own school.

If we really are serious about providing our students with the most vital and usable skills for the future, independent schools need to be nimble in their planning efforts. Not only will we be modeling the same learning behavior that we expect in our students, but we will also be positioning our schools to welcome and accept the future.

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