

Building a Comprehensive Strategic Plan: The Missing Piece of the Puzzle

Why a complete facilities evaluation is a vital part of any strategic plan.



Presenter Introductions

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Housekeeping

- Questions
- Phones
- Copies of Presentation
- Request Resources



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Lesson Plan

After this session, attendees will be able to:

- Identify the basic components of a strategic plan
- Identify what is included in a facilities evaluation
- Understand how environmental factors affect learning and health
- Describe 21st century learning spaces
- Calculate enrollment projections using the Cohort Survival Method for Student Enrollment



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Quote #1



Alice talking with Cheshire Cat

"Would you tell me, please, which way I ought to go from here?"
"That depends a good deal on where you want to get to," said the Cat.

"I don't much care where ----," said Alice.

"Then it doesn't matter which way you go." said the Cat.

"---- as long as I get somewhere," Alice added.

"Oh, you're sure to do that," said the Cat.

Lewis Carroll - Author, Mathematician



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Lessons from “Wonderland”

Lesson 1: **Vision and Mission** – See and know where you want to go before making a plan to get there.

Lesson 2: **Goals and Objectives** – You will go somewhere, even if you do nothing. Set goals and plans to achieve them.



Strategic Plan Essential Elements

Mission – Why does your school exist?

Vision – What do you want to “see” in the future?

Core Values – Your beliefs will drive your behavior while you reach your vision.

Goals – What targets do you need to achieve to reach your vision?

Objectives – Reaching goals through “SMART” objectives (Specific, Measurable, Achievable, Realistic, Time based)

One Size Does Not Fit All

- **SWOT/TOWS Analysis** – Strengths, Weaknesses, Opportunities, Threats. SO, ST, WO, WT
- **SOAR Analysis** – Strengths, Opportunities, Aspirations, Results
- **The Grand Conversation** – “Schools Cannot Do It Alone,” Jamie Vollmer
- **Future Search**
- **Planning Through Committee**
- **“Chainsaw Planning”**

Quote #2

“If everyone is thinking alike, then someone isn’t thinking.”

George S. Patton



The Single Focused Strategic Plan

Curriculum
Technology
Achievement
Behavior
School Climate
Staffing
School Finance
Communications
Community and Parent Involvement
Leadership
Policy and Governance
Facilities



G-E-T Building Utilization



The Comprehensive Strategic Plan



School Facilities Affect ...

- **Curriculum options**
- **Ability to integrate technology**
- **Student achievement and behavior**
- **School climate**
- **Staff accidents, absences, health, and attitude**
- **School finance**
- **Communications with staff, parents, and community**
- **Community pride**
- **Security**

1 in 3 District Strategic Plans Do Not Include Facilities



Quote #3

“School is a building which has four walls with tomorrow inside.”

Lon Watters, Teacher



The Facilities Study

- **Structural Condition of Building Envelope and Interior Structures**
- **Mechanical, Electrical, Plumbing (MEP) Age and Condition**
- **Health, Safety, and Security**
- **Environmental Issues and Hazards**
- **Utility Analysis – Electrical, Heating, Water Usage**
- **Instructional and Non-Instructional Space Analysis**
- **Enrollment Projections**

Structure and MEP

- **What structure and MEP ideas that should be in the strategic plan?**
- **Sample Goal** – Create a long-term facilities plan that includes budgeting for equipment replacement.
- **Sample Objective** – Produce a list of equipment schedules that includes date purchased, equipment location, estimated remaining useful life, and notes on recent maintenance.



Health, Safety, and Security

- **What are the health, safety, and security issues to put into the strategic plan?**
- **Sample Goal** – Our District will properly meet state requirements for all fire, tornado, emergency, and safety drills.
- **Sample Objective** – Create and verify a crisis response is fully implemented.



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Quote #4

“Health is so necessary to all the duties, as well as the pleasures of life, that the crime of squandering it is equal to the folly.”

Samuel Johnson, British author



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Environmental Issues

- **What environmental issues are important to learning, behavior, and health.**
- **Sample Goal** – Expose students and staff to healthy learning environments.
- **Sample Objective** – Test drinking water for lead to ensure levels are within the EPA's acceptable range.



Quote #5

“Underground nuclear testing, defoliation of the rain forests, toxic waste ... Let's put it this way: if the world were a big apartment, we wouldn't get our deposit back.”

John Ross



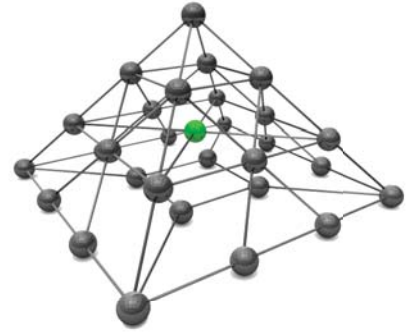
Utility Analysis

- **What is the importance of analyzing your utility bills?**
- **Sample Goal** – Reduce energy usage in our District by 1% during the 2018-19 school year.
- **Sample Objective** – Benchmark utility data to establish a consistent baseline. Work with an energy consultant to learn proper scheduling and controls.



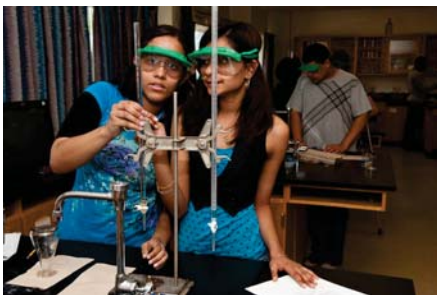
Prioritizing FIMs

- Health and Safety**
- Educational**
- Maintenance**
- Cost and Savings**



Space Analysis

- **How does a space analysis fit into a strategic plan?**
- **Sample Goal** - Offer a STEM program.
- **Sample Objective** - Create a STEM classroom.



G-E-T Strategic Planning Process



Enrollment Projections

- **How do enrollment projections fit into a strategic plan?**
- **Sample Goal** – Calculate enrollment projections to ensure adequate instructional and non-instructional spaces for future enrollments.
- **Sample Objective** - Calculate enrollment projections using the Cohort Survival Method.



Enrollment Projections

Cohort Survival Analysis for Enrollment Projections												
Area Births: Requires stability in the birth rate (no outside factors causing high or low birth rates)												
2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	Birth Trend		2014-15	2015-16	2016-17	2017-18	2018-19
152	133	123	151	142	136		101%	133	159	153	137	139
Total Enrollment (Resident Enrolled + OE-in) Past Five Years						Projected Enrollment (Resident Enrolled + OE-in) Future Five Years						
Grade	2013-14	2014-15	2015-16	2016-17	2017-18	Grade	Average Survival Rate	Projections				
4K	104	103	116	100	103	4K	77%	2018-19	2019-20	2020-21	2021-22	2022-23
K	140	124	122	123	138	K	93%	126	123	147	142	127
1	147	134	115	122	123	1	97.11%	134	122	120	143	138
2	146	146	126	113	120	2	97.49%	120	131	119	117	139
3	129	144	144	125	112	3	98.90%	119	119	129	118	115
4	128	157	136	148	128	4	105.33%	118	125	125	136	124
5	125	134	153	136	150	5	101.24%	130	119	127	126	138
6	127	132	124	151	136	6	98.85%	148	128	118	125	125
7	108	134	127	129	157	7	102.43%	139	152	131	121	128
8	110	106	131	125	127	8	98.20%	154	137	149	129	119
9	105	109	104	133	127	9	100.08%	127	154	137	149	129
10	120	100	102	101	129	10	95.73%	122	122	148	131	143
11	131	115	94	100	99	11	96.06%	124	117	117	142	126
12	137	133	114	127	108	12	102.15%	101	127	119	119	145
Year Totals	1,757	1,769	1,708	1,705	1,752	Year Totals	1,764	1,798	1,804	1,804	1,803	1,803
		101%	97%	100%	103%	% Change	101%	101.91%	100.34%	100.00%	99.94%	

Quote #6

“A good hockey player plays where the puck is. A great hockey player plays where the puck is going to be.”

Wayne Gretzky



Questions

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