

## **Strategic Planning to Reimagine a Bolder Future for California Charters**

*By Annie Crangle & Jonathan Kaufman, Third Plateau Social Impact Strategies*

Charter schools reach out to EdTec for a variety of support services – school development, financial management, and data support – but as the California funding climate becomes a bit more comfortable, a different type of service request is on the rise: In-depth strategic planning. We're going to take a brief look at the reasons charters are engaging in it, and whether it could be a good time for yours to do the same.

### **How do organizations realize they are in need of strategic planning?**

Based on our experiences, schools in need of strategic planning experience one or more of the following:

- A desire to deepen and/or broaden their impact
- A general feeling that the organization can do more
- An identified opportunity without a formulated action plan on how to capitalize on it
- No long-term vision or consensus on vision
- Internal conflict and/or a dysfunctional organizational culture
- A sense that the organization could better leverage its resources
- A recognition that community and/or student needs are shifting, but an uncertainty on how to adapt the school's programming to meet those changing needs
- A need to build stronger community relationships and partnerships

Bottom line, any organizational leader who is not satisfied with the status quo and has a desire to improve and potentially grow their organization is in a position to significantly benefit from a strategic planning process.

### **What is strategic planning?**

Strategic planning is a process that helps an organization identify its goals, assess the hurdles to achieving those goals, and design strategies to overcome those hurdles. Good strategic planning is collaborative, bringing diverse stakeholders to the table to answer two key questions: 1) What is possible? and 2) How do we get there? While 1- or 2-day strategic planning retreats are great for getting the ball rolling, a strong strategic planning process typically takes between 4-8 months.

### **What's standing in your way?**

The reality is that many schools are currently facing one or more of the common reasons listed above that trigger a strategic planning process, but almost all feel unequipped to engage in such a process, overwhelmed by the time, energy, and added responsibility. The day-to-day

demands on school staff to deliver a high-quality education leave school leaders feeling stretched thin and without the capacity to think long-term. Academic excellence, family and community engagement, Board relationships, and funding are just a handful of the strategic priorities school leaders are scrambling to coordinate and execute.



And school resources and funding are limited. Investing resources for a strategic planning process means fewer dollars for academic supplies; staff time and energy dedicated to organizational strategy may mean less time talking with parents or updating lesson plans.

We recognize the resource and capacity constraints schools face, but still argue the value of planning for the future. Nonprofits and government agencies in almost every other sector—health, poverty, international development, etc.—have come to this realization, too. We believe (and have seen) that no matter the industry, sector, or mission, a strong, clearly defined organizational strategy is vital for both short-term and long-term success.

### **Why invest in strategic planning?**

Despite the challenges, schools with aspirations and goals such as a desire to replicate their model in more communities, serve more students, influence the education landscape, or better engage families, all require a plan that is actionable, supported by the community, and designed to effectively and efficiently achieve the end goal.

All charter schools, regardless of where they are in their renewal cycle, need the same fundamental components for success: a common vision, aligned staff and leadership, and a strong, coordinated support network. An effective strategic planning process builds and reinforces all of these pieces, and does so within the context of the unique needs of the community and strengths of the school.

Here are a few of the primary benefits realized through a strategic planning process for schools:

- Strategic goals and priorities that build on the unique strengths of the school and further academic achievement
- Aligned school staff and stakeholders
- Improved engagement with families and community
- Purposeful growth and expansion
- Deeper and broader impact
- Aligned funding and financial sustainability

### Is your organization ready?

Here's a checklist of what you need in order to meaningfully engage in a strategic planning process and realize the benefits:

- An identified champion of the process and leadership support
- Ability to direct time, energy, and brain capacity to the process
- Open mindedness and willingness to change with a focus on impact
- Eagerness to be transparent and collaborative
- A team mentality that strategic planning is an investment, and a commitment to persevere through the inevitable challenges with grit and determination
- Appreciation that the process is just as valuable as the end product

### EdTec's Partnership with Third Plateau

EdTec is pleased to partner with *Third Plateau*, adding to our team of consultants that bring diverse subject matter expertise to charter schools. *Third Plateau* provides thought partnership and support for strategic planning, business planning, development strategy, community engagement, and board development and training.

Third Plateau is a multi-disciplinary social impact strategy firm that partners with bold visionaries in the social sector to drive meaningful, substantial, and sustainable change. The firm approaches the work with an emphasis on community and stakeholder engagement, innovative and creative thinking, clearly defined metrics, and strong relationships.

EdTec has built a reputation of holding charter schools to the highest standard, pushing administrators and teams to invest in strong systems and processes. Strategic planning is a critical piece of this puzzle, and now with the *Third Plateau* partnership, we're ready to help you reimagine, expand, and realize the true potential of your impact.

If you are interested in learning more, please contact Jonathan Kaufman, Co-Founder and Chief Nonprofit Officer, Third Plateau Social Impact Strategies, at [jonathan@thirdplateau.com](mailto:jonathan@thirdplateau.com). 

**Partnership in Action:** Last month, Kepler Neighborhood School (KNS) convened their Board of Directors and school leadership team for a one-day retreat focused on strategic planning and board development with *Third Plateau*. The three core objectives of the day were:

1. **Come to consensus around KNS's strategic priorities for the next 5 years;**
2. **Begin the conversation around how KNS will achieve those goals; and**
3. **Define the responsibilities and articulate the expectations of KNS Board members.**

*"We learned how to develop and leverage both individual and group strengths to achieve our strategic priorities and goals. I'm happy to say we are putting our action plan to work and as a result voting in our newest board member in three weeks."* -Christine Montanez, KNS Principal