EAB

AASA
THE SCHOOL SUPERINTENDENTS ASSOCIATION

Welcome!
Introduce Yourself in the Chat!

Share your name, district, and your role

Rethinking Strategic Planning

Three Inspiring Alternatives to an Outdated Process

Presented by EAB and AASA

EAB

Events for District Leaders

Superintendent Research Briefings

We summarize the latest research on K-12's biggest challenges to help district leaders *get smart* and *make progress*.

> EAB's research and information are some of the best I've seen... **simple, concise, easy to understand.**
>
> *Superintendent,*
> *Missouri School District*

The District Leadership Forum

A Comprehensive Partnership Designed to Help District Leaders Accelerate Progress on Critical Challenges

- Annual Forum research agenda
- Custom reports on district-specific issues
- Online library with research briefs and insight papers

- Executive roundtables for superintendents
- Best practice presentations and workshops for your team
- Executive skills trainings for principals

- Personalized implementation pathways
- Implementation planning cohorts, toolkits, and resources
- Unlimited access to strategic advising from EAB experts

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Working Together to Tackle Today's Most Pressing Challenges

Where Partners Have Directed Our Research So Far…

Select examples

- Raising Early Literacy Scores
- Reducing Disruptive Behavior
- Raising Teacher Morale
- Minimizing Chronic Absenteeism
- Preventing Mental Health Crises
- Developing Effective Principals
- Closing College Access Gaps
- Integrating Career Development
- Managing District Flashpoints

Recent and Upcoming Research Agenda

Latest requested topics of focus

Recent Research Initiatives

- Navigating Opportunities and Pitfalls of AI
- Building a High-Performance District

2025 Research Agenda

- Managing the Changing Educator Pipeline
- Solving the Math Readiness Equation

100+ issues addressed in our research library

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Meet Your Presenters

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Connect with EAB

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Successful School Systems Are Built on a Shared Vision of Success

The Eight Hallmarks of a High-Performance District

1. Shared vision and goals
2. Role and ownership clarity
3. Hardwired accountability
4. Balance of standards and autonomy
5. Data-driven decision-making
6. Outsized investment in leadership development
7. Continuous focus on employee engagement
8. Practice of sourcing and scaling innovations

District Leadership That Works (Marzano & Waters, 2006)

District Leadership That Works

Five district leadership behaviors with a statistically significant ($p<.05$) effect on student achievement:

1. **Collaborative goal-setting**
2. **Non-negotiable goals** for achievement and instruction
3. **Board alignment** with and support of district goals
4. **Monitoring the goals** for achievement and instruction
5. **Use of resources to support the goals** for achievement and instruction

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Strategic Planning is the Vehicle of Choice for Most Districts

Five-Year Planning Processes Have Many Potential Benefits

Engage the Entire Community

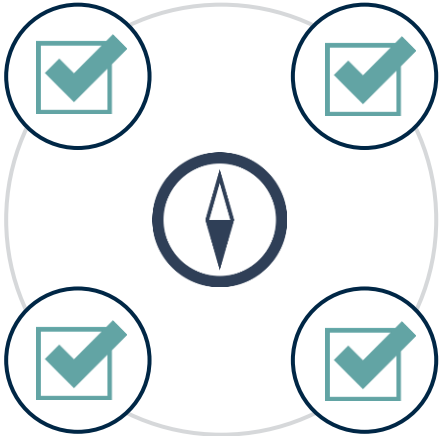
Listen to experiences and needs

Generate buy-in and ideas

Re-Clarify Purpose and Values

Re-ground stakeholders in the mission

Acknowledge changing expectations



Provide Direction and Inform Investments

Define priorities and initiatives

Clarify what's out of scope

Improve Student Outcomes and Experiences

Entrepreneurial in nature

Commits the district to 'bets'

Source: EAB Interviews and Analysis

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… But Plans Often Leave Educators Un-Inspired and Overwhelmed

Three Common Themes We Hear From School and District Leaders

Skepticism About Priorities

"Every change in leadership brings a new set of priorities. So we go with the flow, but I've learned not to overinvest and get on with my job."

~ Principal, VA

Skepticism About Solutions

"We've thrown the kitchen sink at improving reading, behavior, attendance, you name it. I think people have a hard time buying why the next approach will lead to different results than the last."

~ Principal, PA

Too Much to Get Done

"Could we achieve more by doing less? We're constantly trying to keep our heads above water, and it's exhausting."

~Superintendent, NY

90%+ of superintendents cite prioritization as a significant challenge

Source: EAB Interviews and Analysis

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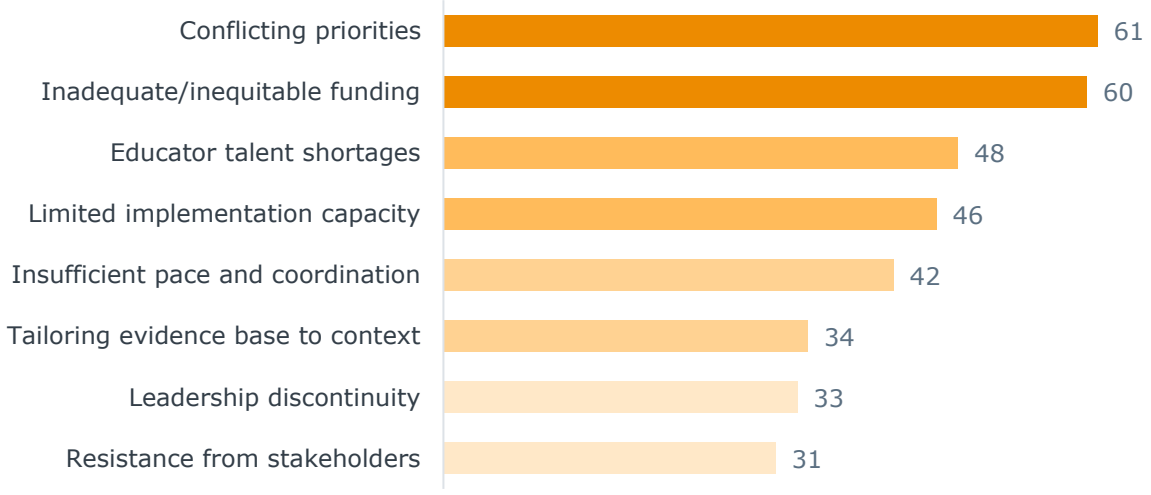
… And Overloaded Agendas Increase Our Odds of Falling Short

Why K-12 Transformation Efforts Fail

% of times each issue was listed in the top 5 for all transformations (n=422)



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Today's Agenda

1. Discuss why strategic planning often falls short of its potential
2. Share three alternative approaches to strategic planning for schools
3. Discuss how those processes combine to create a new model for K-12 strategy

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Thought Exercise

How Would You Want the New York Times to Finish This Sentence?

U.S. INTERNATIONAL CANADA ESPAÑOL 中文

GIVE THE TIMES Account

Friday, Sept 20, 2030

The New York Times

S&P 500 +1.7% ↑

U.S. World Business Arts Lifestyle Opinion Audio Games Cooking Wirecutter The Athletic

[INSERT NAME] School District has finally achieved its audacious goal of…

STOP

Name 5 things you would stop doing to achieve that goal

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A Familiar Process…

A Simplified Summary of How School Systems Develop Strategic Plans

STAGE 1	STAGE 2	STAGE 3	STAGE 4
Crowdsource Input	**Group Needs and Wants Into Pillars**	**Draft Initiative Lists and Metrics**	**Debut the Plan to the Community**
Focus groups and town halls ask stakeholders about district strengths and weaknesses, what they want to change	District leaders categorize requests and strive to ensure all stakeholders feel heard	Districts add 5-7 (or more) initiatives to each pillar and discuss ways to measure progress in each area	Presentations and brochures designed to show stakeholders "what we heard" and "what we will do"

Source: EAB Interviews and Analysis

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...Produces Predictable Results...

Where Districts Are Focused Today

Percent of Districts Citing the Following[1] as a Strategic Pillar/Goal (n=100)

- 99% Academic Achievement
- 85% Skilled, and Supported Workforce
- 81% Post-Secondary Readiness
- 92% Community Engagement and Support
- 91% Individual and Collective Wellbeing
- 69% Operational Excellence and Fiscal Responsibility

Core Values

Equity | Innovation

"I think most district strategic plans look the same because we need to show parents, staff, and community members that we are focused on the things they care about. So, these are really just the expectations for a good school system today."

~ Superintendent, PA

Source: EAB interviews and analysis

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… and a Persistent Set of Pitfalls

Where Districts Are Focused Today

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- 69% Operational Excellence and Fiscal Responsibility

Core Values

Equity | Innovation

Four Common Pitfalls Found in Traditional Strategic Plans

Problem 1: Promises to make progress on everything within five years

Problem 2: Moonshot sub-goals

Example: Ensure that every student develops the skills and knowledge needed to be successful, Pre-K through 12th Grade

Problem 3: Initiatives before analysis

Problem 4: No mention of external factors

Source: EAB interviews and analysis

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Three Alternative Approaches

How District Leaders Can Break Free From the Constraints of Traditional Planning

The "Long-Game" Playbook

Establishing a platform for continuous improvement on the issues that matter most

The Dynamic Strategy Playbook

Strategic prioritization that accounts for external change

The Strategic Futurism Playbook

Preparing for the future while improving the present

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Three Alternative Approaches

The "Long-Game" Playbook

Establishing a platform for continuous improvement on the issues that matter most

The Dynamic Strategy Playbook

Taking a year-by-year approach to strategic improvement and change

The Strategic Futurism Playbook

Harnessing external trends to craft a bold change agenda

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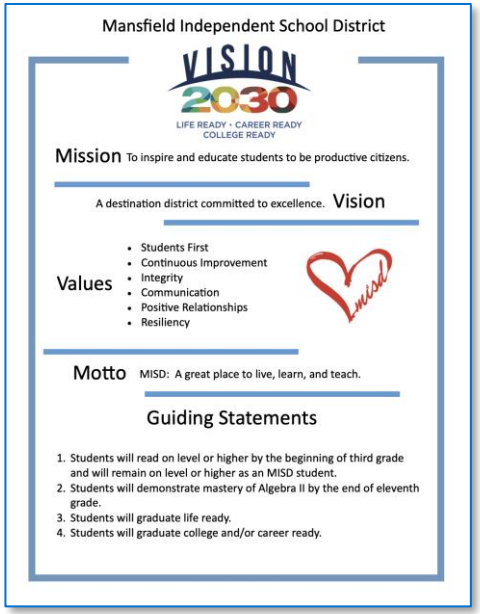
Mansfield ISD Committed to a Long-Term Vision of Success


Mansfield Independent School District

VISION 2030

LIFE READY • CAREER READY
COLLEGE READY

Mission To inspire and educate students to be productive citizens.

A destination district committed to excellence. Vision

Values
- Students First
- Continuous Improvement
- Integrity
- Communication
- Positive Relationships
- Resiliency

Motto MISD: A great place to live, learn, and teach.

Guiding Statements

1. Students will read on level or higher by the beginning of third grade and will remain on level or higher as an MISD student.
2. Students will demonstrate mastery of Algebra II by the end of eleventh grade.
3. Students will graduate life ready.
4. Students will graduate college and/or career ready.

Four Guiding Statements Define Mansfield's Vision of Student Success

- Students will read on level or higher by the beginning of third grade and remain on level as an MISD student
- Students will demonstrate mastery of Algebra II by the end of eleventh grade
- Students will graduate life ready
- Students will graduate college and/or career ready

Keys to Sustaining Focus on a Consistent Vision

Continuation of Vision 2020	Vision written into board policy	Superintendent selection criteria align with vision	Embedded commitment to continuous improvement

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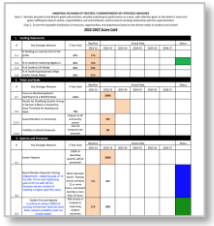
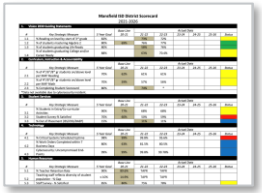
Source: Mansfield ISD Vision 2030; EAB interviews and analysis.

Scorecards Define Everyone's Role in Delivering the Vision

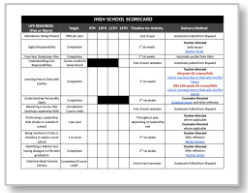
Guiding statements are translated into concrete requirements through scorecards



Board-level scorecard



District administration scorecard



Student-level scorecards

Student scorecards are explained through videos for both students and parents

Source: EAB Interviews and Analysis; www.mansfieldisd.org

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Principal's Focus Annual Improvement on the Highest Leverage Issues

Site-Based Cycles of Accountability Bring Real Strategy to School Improvement

What's the one thing, if achieved, that will have the greatest positive impact on everything else?

1. **Identify the "one thing"** that would have the greatest impact
2. **Conduct a root cause analysis** for their chosen issue
3. **Craft a strategy** for addressing identified root causes
4. **Report on progress 4x per year** (make requested adjustments)

Beyond the "One Thing"

"It shouldn't be easy to choose their one thing – there should be a two, three, and four. That's where distributed leadership comes into play."

~Dr. Sean Scott, Deputy Superintendent

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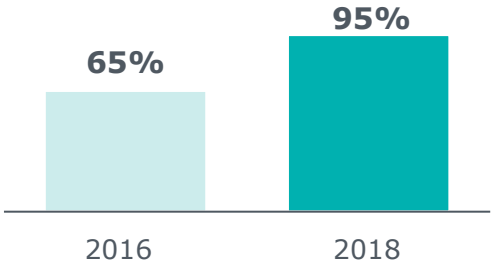
Source: EAB interviews and analysis; www.mansfieldisd.org

Site-Based Success Stories Lead to District-Wide Practice

2018

Elementary Principal Unlocks Rapid Growth in Reading Scores

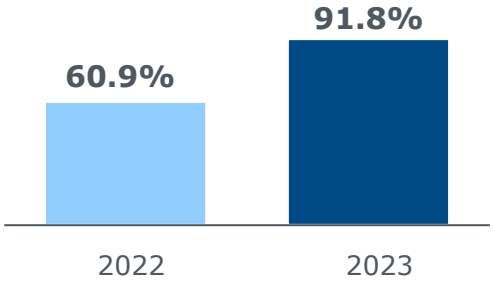
% of Grade 2 students reading on grade level in one Mansfield elementary school



2023

Summit High Makes Huge Strides on College, Career, or Military Readiness Measures

% of students graduating CCMR, Summit High School



When we find practices that deliver results, that becomes the new floor across the district. We don't want our leaders to need to be heroes to be successful."

~ Dr. Sean Scott

Source: EAB Interviews and Analysis

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Three Alternative Approaches

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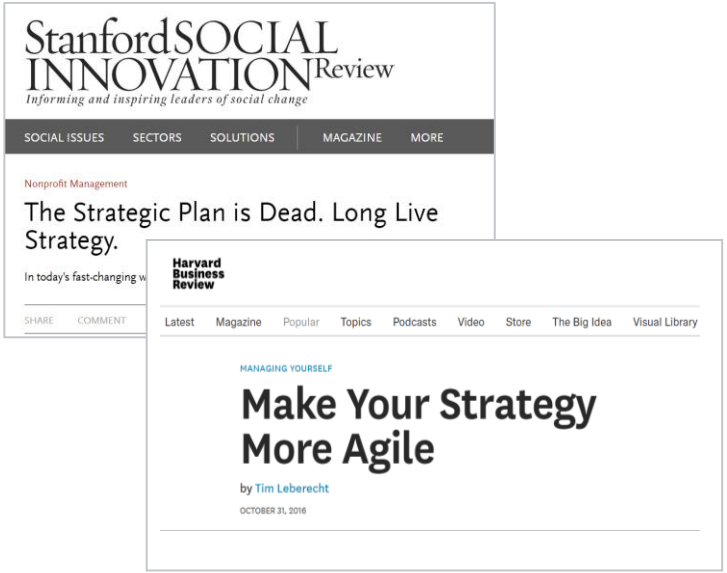
Five-Year Plans Quickly Outdated in Our Rapidly Changing World

Organizations Beyond Education Shifting to More Responsive Methods



"We don't have a long-term strategy. Our definition of a long-term plan is: What are we doing today?"

~ Jensen Huang, CEO, NVIDIA

Sources: https://finance.yahoo.com/news/jensen-huang-reveals-nvidia-doesnt-161532949.html#

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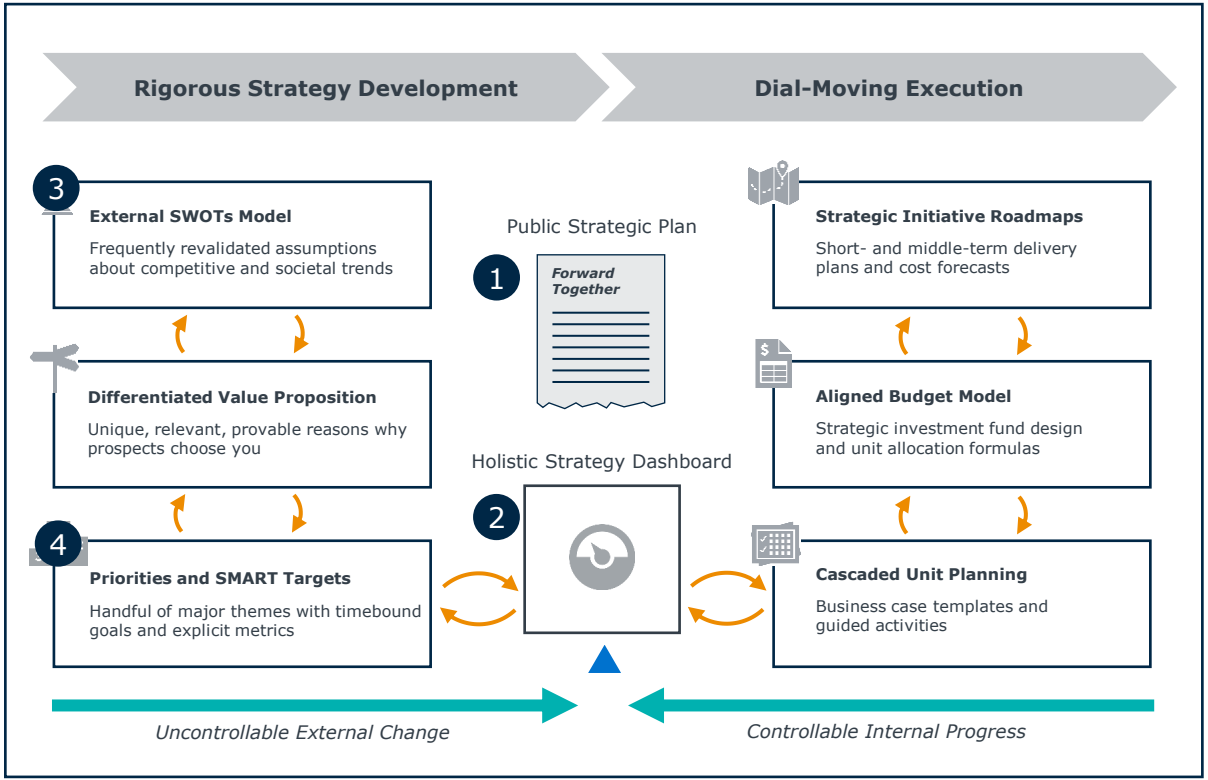
Higher Ed Moving Toward "Dynamic" Strategy Development



Key Takeaways

1. A public-facing plan still exists, provides direction
2. Strategy dashboard used to monitor progress on KPIs
3. External SWOT analyses used to inform prioritization
4. Priorities and SMART targets are evaluated and set at least once per year

Source: EAB Dynamic Strategy Resource Center

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Measuring Progress on the Issues That Will Always Matter

Elevate Traditional "Pillars" to Permanent Priorities With Relevant KPIs

Traditional Strategic Plan Pillars

True North:
Our Strategic Plan

EAB Public Schools, 2024-2029

Board-Owned District Dashboard (5 priorities, +/- 2)

- Academic Excellence
- Post-Secondary Readiness
- Engagement and Wellbeing
- Exemplary Staffing
- Community Support
- Efficient Operations

Key Performance Indicators

Compliance Metrics

- ELA/reading assessment scores
- Math assessment scores
- English Language Proficiency rate

Equity and Identity Metrics

- % of students achieving 4+ in one or more AP courses
- AP enrollment rates by race, gender, and income levels

Source: EAB Interviews and Analysis

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Reviewing Internal Progress and External Trends to Set Annual Agenda

Annual Sensemaking Summits Help District Leaders to Establish Priorities Within Context

Annual State of the District Summit

Two required outputs

Summit Activities

Review District Dashboard

With those changes in mind, what di we need to improve?

Discuss External Changes (PEST)

What shifts do we need to respond to or plan for? How will they affect our work?

Celebrations of Progress

Where we have moved the needle over the past year.

Changes we are well positioned to manage.

What Needs to Change

Top 10 issues the district needs to focus on, based on dashboard review and external landscape analysis

Source: EAB Interviews and Analysis

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Categorize Objectives to Inform Investments of Time and Resources

Give Your Team Permission to Say "No"… or at Least "Not For Now"

Categories for Objectives

Variables	Critical	Important	Desirable
Expectations	**Fixed**	**Best we can achieve**	**Fixed**
Resources	**First allocation of time and funds**	**Fixed**	**When can be spared**
Timeline	**Fixed**	**Fixed**	**Flexible**
Number of Objectives	1	2-4	Remaining

Critical Objective

The one thing that *must* get done.
Senior leader spends time here every day.

Important Objective

Dedicated owners assigned and given fixed resources based on projected need.

Desirable Objective

Time and resources will be allocated if and when they become available.

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Source: Lidow, D., *A Better Way to Set Strategic Priorities*, HBR (2017); EAB Interviews and Analysis

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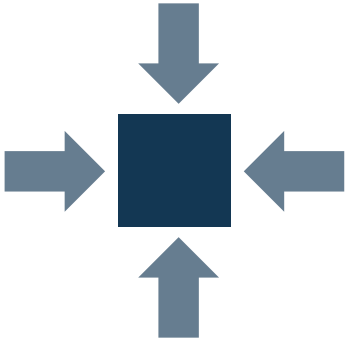
When Planning the Future, We Often Remain Stuck in the Present

Cognitive Biases Cause People to Underestimate the Pace and Scale of External Change



The Here and Now Fallacy

Overreliance on current and internal-state information when planning for the future

- **The Inherence Heuristic**

  The tendency to explain phenomena in terms of inherent or internal (vs. external) causes

- **Projection Bias**

  The tendency to overweight the extent to which the future will resemble the present

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Tomorrow's Reality Lies in the Seeds of the Present

PEST(LE) Analysis Trend Categories

- Politics
- Economy
- Society
- Technology
- (Legislation)
- (Environment)

Uses for PEST(LE) Analysis

1

Navigate Near-Term Change

What's changing and how should we respond?

2

Identify Inflection Points

Which of these trends seem likely to last and therefore provide a future that you can plan creatively for?

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Stanford 2025 Initiative Engages Students in Future-Focused Design

Shifts in Work and Education	Future Vision	What If…
• The future of work will be grounded in projects, not roles • Students are looking for impact and purpose over wealth and freedom	**Purpose Learning**	Students enrolling in university declared missions, not majors?
• Access to knowledge is becoming ubiquitous • Employers increasingly look for skills before content knowledge	**Axis Flip**	Programs were organized by competencies and skills, not disciplines?
• Half-life of professional skills is shortening • Career changes becoming increasingly common	**Open Loop University**	Students could enroll in a university for a lifetime of learning?

Stanford**2025**

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Imagining Bold Futures Unlocks Innovations That Are Relevant Today

SNHU's Stackable Credentials Enable Parallel Progress in Learning and Work

What if…

Students didn't need to pause life career progression to earn a valuable degree?

Stackable Credentials

Three Options:

1. Vertical stacking: add up to a degree
2. Horizontal stacking: Credentials accelerate job readiness
3. Value added stacking

Sources: SNHU.com (2025) *Upskilling With Digital Badges;* EAB Interviews and Analysis

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Engaging Your Community in Strategic Futurism

Four Stages in Crafting Future-Focused Vision and Goals

Explore Potential Futures

Engage students, teachers, and parents in an exploration of what's changing and how schools could adjust.

STAGE 1

Identify the 3-5 Most Impactful Changes

Discuss which future-focused changes are feasible and would would have the greatest positive impact on student outcomes.

STAGE 2

Craft a Cohesive Future Vision

How will the district look different in 5-10 years? What will we stop, start, and continue get there?

STAGE 3

Anticipate Failure to Plan for Success

What barriers need to be overcome? What assumptions need to be verified and monitored?

STAGE 4

Conduct an annual review of trends and assumptions to validate relevance and adjust

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Comparing the Strengths and Weaknesses of Each Approach

	Community Engagement	Innovation & Differentiation	Impact on Outcomes	Feasibility
The "Long-Game" Playbook	◕	◑	◕	◑
The Dynamic Strategy Playbook	◑	◔	◕	●
The Strategic Futurism Playbook	◕	●	◑	◔

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Designing a Comprehensive System for Strategic Planning

Components of an Ideal District Strategy System

A Long-Term View of Success

- ”Pillars” that will always matter to students and parents
- 3-6 KPIs for each pillar that can be used to track progress

Dynamic Agenda Setting and Prioritization

- Annual review of internal metrics and external change
- Categorized priorities to inform investments of time and resources

Student-Centered Future Visioning

- Workshops and design sprints to imagine bold futures for your schools
- Exploration of which innovations would elevate student success today

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Source: EAB Interviews and Analysis

Upgrade Your District's Approach to Strategic Planning

Three Workshops Designed to Overcome Common Pitfalls in District Strategy Development

Workshop 1

Strategic Dashboard Development Workshop

- Discuss and define long-term pillars and objectives
- Select relevant and trackable KPIs for each pillar
- Map applicability of KPIs to each school and department

Workshop 2

Landscape Analysis and Prioritization Workshop

- Evaluate current performance on district KPIs
- Explore external trends and near-term impact on schools
- Craft lists of celebrations and issues to address
- Prioritize issues using categories for the year ahead

Workshop 3

"Schools of the Future" Design Workshop

- Discuss and define long-term pillars and objectives
- Select relevant and trackable KPIs for each pillar
- Map applicability of KPIs to each school and department

Workshops launching late spring 2025

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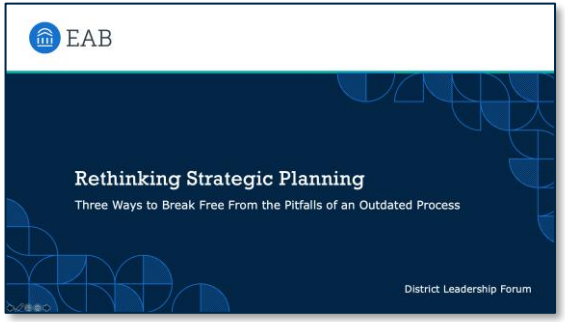
Prepare to Upgrade Your Strategic Planning Today

Two Immediate Opportunities Available to EAB Partners

Team Presentation



- Discuss which pitfalls resonate with your team's experience
- Identify which practices would most benefit your team
- Discuss how to integrate these practices within your state accountability system

Virtual Roundtable

Strategic Planning 2.0

February 5, 2025

1-2:30 p.m. ET

- Unpack the pitfalls of traditional strategic planning
- Explore and discuss new practices to elevate results
- Engage in sample exercises from EAB's strategy development workshops to imagine the future of strategic planning in your schools

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Let's Continue the Conversation in New Orleans

March 6-8, 2025
AASA National Conference on Education
New Orleans, LA

Education Session

Five Questions to Transform Strategic Planning

Featuring Superintendent Panel Discussion and Q&A

Save the Date

Networking Reception at Plates Restaurant

Join EAB and fellow district leaders for a relaxed evening of cocktails, delicious food, and great conversation

Let's Chat

Schedule a Consultation with an EAB Expert

Discuss your strategic priorities and challenges with a member of EAB's research team

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How Else Can We Help?

I'd like to speak with someone further to…

1. Learn more about EAB's strategic planning resources and spring workshops for district leaders
2. Find out how to attend an upcoming partner roundtable
3. Register for EAB's Networking Reception at AASA conference
4. Something else? Choose this option and we will follow up with you

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A Quick Ask

We value your feedback.

Please take a few minutes to **complete the short survey** in your web browser.

Thank you!

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