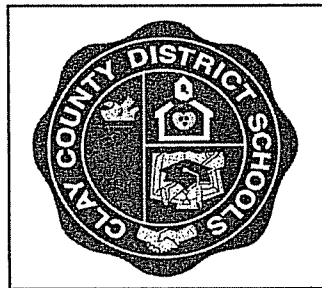


# STRATEGIC



# PLANNING

2007-2012

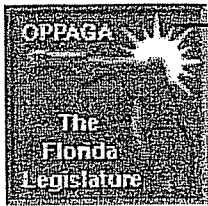
## STRATEGIC PLANNING

Strategic planning is a long-range planning process by which an organization energizes itself toward a common purpose (vision and mission). It is a planning process with a time span of three to five years with annual updates and minor revisions. The planning stages of Strategic Planning can take from six months to one year before plans are implemented. These plans are written, revised, agreed upon and approved by the School Board.

Strategic Planning is not a life-support system - not fixing or replacing - it creates change and creates the future - it builds the way we see the future. Strategic Planning is not to prepare us for the future, but to prepare the future for us. Decisions will be made about the future before the future forces the decision.

Strategic Planning is a blueprint. There are federal and state educational mandates all around us, but excellence cannot be realized through them. It must come from within. Strategic Planning thrives on day-to-day decisions based on the long-range plan. *It is not enough to do something right, but to do the right thing.*

NOTE: The OPPAGA review will expect the plan to be tied to the budget.



Office of Program Policy Analysis and Government Accountability ✓ OPPAGA  
**Sharpening the Pencil Program**

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## Best Financial Management Practices



OPPAGA and the Auditor General developed Best Financial Management Practices for Florida school districts. To develop the best practices, OPPAGA and the Auditor General conducted an extensive literature review; interviewed education finance experts, representatives from professional organizations, and educators in other states; and collaborated with a variety of education stakeholders in Florida. The most recently adopted best practices are presented below.

- [Management Structures](#)
- [Performance Accountability Systems](#)
- [Educational Service Delivery](#)
- [Administrative and Instructional Technology](#)
- [Personnel Systems and Benefits](#)
- [Facilities Construction](#)
- [Facilities Maintenance](#)
- [Transportation](#)
- [Food Service Operations](#)
- [Cost Control Systems](#)
  
- [Best Practices for All Areas](#)

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The best practices are designed to facilitate districts to 1) use performance and cost-efficient measures to evaluate programs; 2) use appropriate benchmarks based on comparable school districts, government agencies, and industry standards; 3) identify potential cost-savings; and 4) focus budget and resources on district priorities and goals, including student performance.

If you have questions about the Best Financial Management Practice Reviews or the best practices, contact [David Summers](#) or [Jane Fletcher](#) at (850) 488-0021 or (800) 531-2477.

*Best Practices With Their Associated Indicators*  
*Best Practices (1, 2, 3 . . .) and Indicators (a, b, c . . .)*  
*Adopted June 2002*

**MANAGEMENT STRUCTURES**

*Best Practices and Indicators*

- e. Changes or concerns in financial condition are reported to the board in a timely manner, and the board takes necessary corrective actions.
- f. The school board has established limits for how much various district staff can spend without approval and it reviews and approves all purchases that exceed these amounts.
- g. The district has taken advantage of significant opportunities to improve management structures, increase efficiency and effectiveness, and reduce costs.
- h. Is there other information that demonstrates the district's use of this best practice that should be considered?

**8. The district has clearly assigned school principals the authority they need to effectively manage their schools while adhering to district-wide policies and procedures.**

- a. The district can demonstrate that it has clearly communicated the authority it has assigned to school administrators; these administrators either know what is expected of them or where to find out.
- b. The district has given school administrators staffing and budget flexibility.
- c. The district has given school administrators sufficient authority over school operations to enable them to achieve school, district, and state education goals.
- d. The district has sufficient controls to ensure that school administrators adhere to district-wide policies and procedures.
- e. The district regularly assesses the authority it has assigned to school-based administrators and looks for ways to enhance school-based decision making.
- f. The district holds school administrators accountable for their performance in achieving school, district, and state educational goals.
- g. Is there other information that demonstrates the district's use of this best practice that should be considered?

**Planning and Budgeting**

**9. The district has a multi-year strategic plan with annual goals and measurable objectives based on identified needs, projected enrollment, and revenues.**

- a. The school district maintains and publishes a clearly written, multi-year strategic plan to provide vision and direction for the district's effort. The plan addresses state and district education goals, including student performance goals.
- b. In developing the strategic plan the board
  - identifies and formally adopts a limited number of district priorities to guide the district's strategies and major financial and program decisions;
  - instructs district staff on how these priorities should be considered in making program and budget decisions.
- c. The strategic plan clearly delineates
  - the district's goals, and objectives and strategies for achieving them;
  - the priorities the board assigns to its goals, objectives, and strategies;
  - the strategies the district intends to employ to reach desired objectives;
  - the performance measures and standards the district will use to judge its progress toward meeting its goals; and
  - the entities responsible for implementing the strategies in the plan and the time frames for implementation.

*Best Practices With Their Associated Indicators  
Best Practices (1, 2, 3 . . .) and Indicators (a, b, c . . .)  
Adopted June 2002*

**MANAGEMENT STRUCTURES**

*Best Practices and Indicators*

- d. The board annually assesses the progress the district has made toward achieving its objectives.
- e. The board annually reviews and, if necessary, amends its priorities and strategic plan to reflect changes in community standards, student needs, or board direction.
- f. Is there other information that demonstrates the district's use of this best practice that should be considered?

**10. The district has a system to accurately project enrollment.**

- a. The district strives to provide an accurate enrollment forecast and does not regularly overestimate or underestimate its enrollment.
- b. The district bases its enrollment projections on statistical enrollment techniques, such as a cohort survival methodology, that can detect turning points due to changing demographics.
- c. When making enrollment forecasts, the district considers additional factors such as planned enrollment changes in private schools, influences due to changes in employment opportunities, city/county comprehensive plans, and planned new development in the district.
- d. The district documents the methodologies and processes for key areas of its forecasting process.
- e. The district has a process for minimizing the adverse effect of projection errors.
- f. The district implements processes to ensure the accuracy of school FTE counts.
- g. Enrollment projections for individual schools consider the existing school populations, mobility, and housing starts within the areas served by each school. School-based administrators review the reasonableness of these projections.
- h. Is there other information that demonstrates the district's use of this best practice that should be considered?

**11. The district links its financial plans and budgets to its annual priorities in the strategic plan and its goals and objectives; and district resources are focused towards achieving those goals and objectives.**

- a. The district links its financial plans and budgets to its priority goals and objectives, including those for student performance.
- b. The district can demonstrate that it assesses performance and adjusts its financial plans and budgets to improve its ability to meet its priority goals and objectives.
- c. District staff is aware of and direct their effort toward the achievement of the priority goals and objectives.
- d. Is there other information that demonstrates the district's use of this best practice that should be considered?

**12. When necessary, the district considers options to increase revenue.**

- a. If additional revenue is needed, the district considers pursuing various local options to increase revenues (e.g., half-cent sales tax, bonds underwritten by voted millage, property taxes).
- b. The district has taken actions to obtain private, state, and federal grants and other alternative funding.
- c. The district has taken advantage of opportunities to improve management structures, increase efficiency and effectiveness, and reduce costs.
- d. Is there other information that demonstrates the district's use of this best practice that should be considered?

**Community Involvement**

**13. The district actively involves parents and guardians in the district's decision making and activities.**

- a. Schools use every practical means of communication to provide timely information to parents/guardians such as: newsletters, flyers, websites, direct school-parent contact, etc.

*Best Financial Management Practices With Their Associated Indicators  
Best Practices (1, 2, 3 . . .) and Indicators (a, b, c . . .)  
Adopted June 2002*

***COST CONTROL SYSTEMS***

***Best Practices and Indicators***

d. Other information that demonstrated the district's use of this best practice and should be considered.

**6. Management proactively responds to identified internal control weaknesses and takes immediate steps to correct the weaknesses.**

a. Internal control weaknesses are identified from external and internal audit reports, risk assessments, grantor monitoring reports, and other sources; such as communications from employees and the public.

b. District management assigns responsibility for resolving internal control weaknesses to appropriate staff.

c. Assigned staff must periodically report to management on progress towards resolving internal control weaknesses.

d. Other information that demonstrates the district's use of this best practice and should be considered.

**7. The district produces an annual budget that is tied to the strategic plan and provides useful and understandable information to users.**

a. Budgets are formed and adopted pursuant to applicable state law and rules.

- Budget meets state-mandated and district required time deadlines.
- Budget document summaries are in approved format and appropriate detail is included.

b. District staff use appropriate revenue-estimating practices when developing estimated budget sources for appropriation.

- Includes prior year comparisons
- Enrollment projections

c. The district has established a budget planning process and timeline that is clearly communicated to all of the involved stakeholders.

d. The district has established a budget planning process to link strategic plan objectives to the development of the budget.

e. School principals include SAC/community input when developing school budgets.

f. Other information that demonstrates the district's use of this best practice and should be considered.

**8. Management analyzes strategic plans for measurable objectives or measurable results.**

a. Strategic plan objectives can be tied to specific departments or projects and provide guidance to determine appropriate expenditures to achieve plan objectives (note-overlaps with accountability chapter).

b. Strategic plan includes a provision for maintaining adequate levels of unreserved fund balance.<sup>1</sup>

c. Management has developed a process that primarily commits funds for activities and projects that meet strategic plan objectives.

d. The district has established appropriate procedures for reviewing, evaluating the financial impact of, and approving budget amendments.

e. Other information that demonstrates the district's use of this best practice and should be considered.

<sup>1</sup> The amount held in reserve considers the potential overestimation of FEFP funding due to error in the district's enrollment projection, potential exposure to emergencies, and potential industry or community changes.

## *STRATEGIC PLANNING*

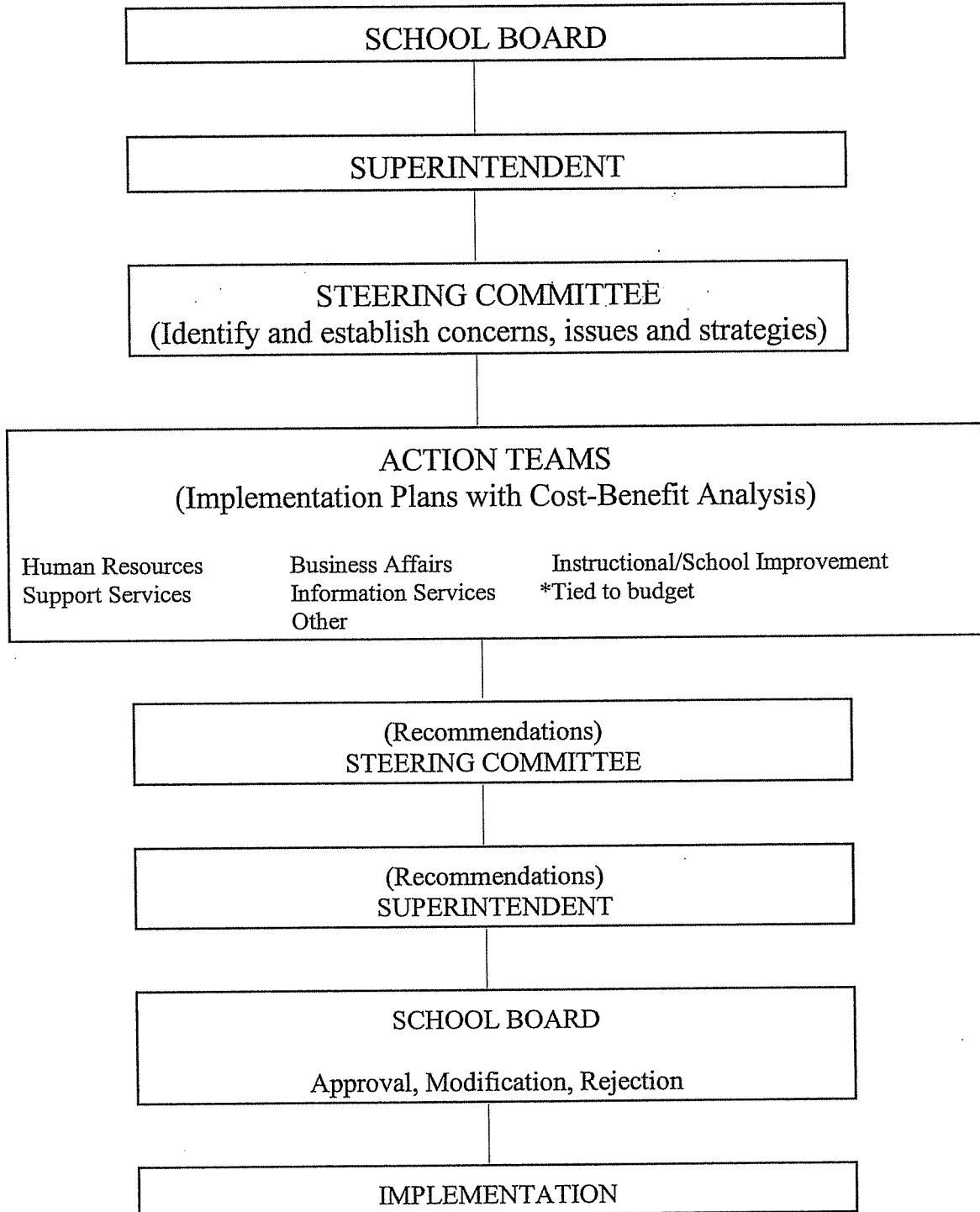
*Legitimately addresses these inquiries:*

- *Do you know what you are doing?*
- *Do you know where you are going?*
- *Do you know how to get there?*
- *Do you know how much it will cost?*
- *How long will it take to get there?*
- *What will the results be?*
- *How do you know when you have done it?*

A **STRATEGIC PLAN** without proper implementation is truly no more than “a vinyl trophy”. Implementation is perhaps the most difficult step of the entire process, but to choose not to do so, after the Strategic Plan is developed by some of the best minds in the district is malpractice.



**STRATEGIC PLANNING MODEL**  
**Clay County School Board Workshop**



## STRATEGIC PLANNING TIME LINE

- ❖ Review Beliefs, Vision, Mission (CCSB) September 7, 2006
  
- ❖ Identify issues, needs and concern → September/October  
(CCSB, Superintendent, District Staff → 2006  
Develop Strategies ... →  
(Steering Committee)
  
- ❖ Action Teams created - Develop Action Plans November, 2006 -  
w/Implementation steps & cost/benefit analysis January, 2007
  
- ❖ Prioritize/Sequence/Fund Action Plans - February/March  
2007
  
- ❖ Clay County School Board Approval April 19, 2007
  
- ❖ 2007-2008 Budget Development to include May, 2007  
First Year Strategic Plans

**SCHOOL DISTRICT OF CLAY COUNTY  
STRATEGIC PLANNING STEERING COMMITTEE  
2007-2012**

**Deputy Superintendent, Chairman ..... Ben Wortham  
X-2620**

**Superintendent ..... David Owens  
X-6510**

**Asst. Supt. for Business Affairs ..... Dr. George Copeland  
X-6501**

**Asst. Supt. for Instruction ..... Denise Adams  
X-2614**

**Asst. Supt. for Support Services ..... Mike Elliott  
X-6518**

**Asst. Supt. for Human Resources ..... Ira Strickland  
X-2618**

**Chief Information Officer ..... Tom Moore  
X-2640**

**Public Relations Officer ..... Darlene Mahla  
X-2143**

## BELIEFS

The statement of beliefs is the most logical, if not the most necessary, beginning of any strategic plan. It is a formal expression of the organization's *fundamental values*: its ethical code, its convictions, its commitments. Essentially, it describes the moral character of the organization. That means that the statement of beliefs of an organization must represent a composite, a distillation, of the personal values of those who make up the organization.

The statement of beliefs should not be merely an acknowledgement of what the organization is, but an expression of what it is at best. The statement of beliefs serves a dual purpose: First, it will provide the value system upon which the subsequent portions of the plan will be developed and evaluated; second, it will, as part of the published plan, become a public declaration of the organization's heart and soul. Because it is so important, the statement of beliefs must be precise in language and practical in application. Long, rambling, hazy, philosophical treatises are neither precise nor practical and, therefore, have no place in a serious plan.

Quite in contrast, an effective statement of beliefs is simply formatted, crisply stated, and easily understood.

## **BELIEF STATEMENTS**

### ***We believe:***

- *That learning is a life long process.*
- *That a positive environment encourages success.*
- *That enthusiasm is a positive motivator for learning.*
- *That the freedom to be creative stimulates growth.*
- *That common values and laws exist in our society, to maintain order and respect.*
- *That education is a partnership between school, home and community.*
- *That effective communication fosters involvement and develops trust.*
- *That high expectation promotes high achievement.*
- *That excellence is achieved when individuals strive for their maximum potential.*
- *That personal decision making and self-discipline are the basis of freedom.*
- *That each individual has the right to exist in a safe environment.*
- *That each individual is accountable for his/her own actions.*
- *That each individual is worthy of respect.*
- *That every individual has the potential for positive change.*
- *That all students can learn and be successful.*
- *In valuing all people as unique individuals.*
- *That excellence is directly proportional to a shared commitment to achieve, lifelong learning by students, parents, educators and the community.*
- *That a continuum of developmentally appropriate experiences enables all citizens to be active, lifelong learners.*
- *In setting high expectations, leading by example, providing support for achievement and recognizing accomplishments.*
- *That growth is nurtured in a climate that encourages and celebrates cooperation, initiative, creativity, critical thinking, innovation and risk-taking.*
- *That a safe, healthy and caring environment promotes success and enhances self-esteem.*
- *That the cultural diversity of our community enriches the learning experience.*
- *That decisions about teaching and learning should be made by the people closest to the students impacted by those decisions and should reflect shared responsibility, teamwork and collaboration among those affected by the decision.*
- *That our vision is attainable when mutual respect, responsibilities and trust permeate our relationships, attitudes, actions and objectives.*
- *Excellence is achievable and always worth the investment.*
- *Each individual has unlimited potential.*
- *Education is the discovery of truth and the creation of new realities.*
- *All people have equal intrinsic worth.*
- *All people can learn anything.*
- *The family is the primary influence in the development of the individual.*
- *Higher expectations yield higher results.*

## **MISSION STATEMENT**

The Clay County School District, in partnership with the entire community, is dedicated to providing a quality education in a safe, inviting environment so that all students learn and become successful, responsible citizens.

## **VISION STATEMENT**

The School District of Clay County in partnership with families and community, will provide a public education experience that is motivating, challenging, and rewarding for all children. Honesty and integrity, coupled with respect, individual responsibility, and learning opportunities that are rigorous, relevant and transcend beyond the boundaries of school walls, ensure an environment that maximizes student potential. Together, we prepare life long learners for personal success in a global society.

## **DEVELOPMENT OF ISSUES, NEEDS AND CONCERNS**

Points to consider ...

- What do you want/need to do in the next 3-5 years?
- What changes should be made in the next 3-5 years?
- What have you been requesting as non-funded priorities in past years?
- What items/categories currently make up the largest percentages of your budget?
- What areas in your current long-range goals (Comprehensive Improvement Plan) need addressing?
- What areas in your division/department can be improved without cost?

**STRATEGIC PLANNING  
AREAS FOR CONSIDERATION**

**(Issues, Needs or Concerns)**

Program Delivery

Facilities

Curriculum/Instruction

Human Resources

Safety and Security

Technology

Innovative Programs

Community Involvement

Public Relations/Communications

Funding and Finance

Transportation

Governance

Testing

Teacher Recruitment/Retention

Fund Balance

Adult Literacy

Others