

## CONCEPTUAL REVIEW OF STRATEGIC PLANNING

In preparation for the creation of the 2025-2030 strategic plan, The Chicago School formed a Steering Committee to guide a comprehensive and inclusive planning process. In July 2024, the Steering Committee launched the first phase of this process – data collection. Three working groups were established to collect relevant data, and the charge for this group was to complete a conceptual review of strategic planning. The group reviewed relevant documents and engaged goal and initiative owners for the current strategic plan to collect information about lessons learned. Focus group stakeholder feedback based on The Chicago School's 2020-2025 Strategic Plan revealed several significant successes and valuable insights for future strategic planning.

Discussions centered around what worked well during the previous strategic plan development highlighted the crucial need to continue aligning the plan's goals with employees' workload responsibilities. Additionally, the inclusive strategic plan development process was considered vital in incorporating diverse perspectives and fostering collaboration across functional areas to create interdisciplinary approaches in achieving shared goals. Moreover, the ongoing use of comprehensive and diverse data collection approaches to develop a detailed SWOT analysis was recognized as a key success of the current plan. Stakeholders further characterized the annual review process as facilitating continuous evaluation and adjustment, which ensured the plan's adaptability to both evolving and unforeseen circumstances. This highlights a noteworthy theme focused on the plan's flexibility as a significant strength since the review process enabled the adaptation of goals to changing environments. Building on these insights, the following points summarize what worked well in the implementation of the 2020-2025 strategic plan:

- **Integration with Daily Tasks:** Goals were connected to daily responsibilities which promoted a sense of ownership and relevance.
- **Collaborative Development Process:** Interdisciplinary teams contributed diverse perspectives and collaborative efforts across various functional groups.
- **Thorough Data Collection:** Extensive data gathering supported a comprehensive SWOT analysis to consider both internal and external factors.
- **Ongoing Review Process:** Regular evaluation and adjustments ensured the plan remained relevant and adaptable.
- **Flexibility and Adaptability:** The plan was designed to evolve in response to changing circumstances.

The focus group discussions also uncovered significant lessons learned. One key theme identified from these sessions was the necessity of continuous effort and clear communication to maintain alignment between goals and employees' workload. Another theme highlighted the need for ongoing inclusivity among stakeholders during the development phase to adequately address emerging concerns. Stakeholders also described the importance of improved tracking and reporting mechanisms in future strategic plans to enhance transparency and accountability for achieving established goals. Additionally, clear funding parameters were conveyed as a necessity for developing feasible goals and achieving goal activities effectively. Celebrating milestones and successes during the goal implementation process was shared as a vital role in keeping employee morale high and sustaining their motivation long term. The themes and lessons learned from the strategic plan's implementation are outlined below.

- **Strengthened Goal Alignment:** Concerted efforts are required to ensure goals remain aligned with employees' workloads.

- **Sustained Inclusivity:** Ongoing engagement with diverse groups is vital throughout the implementation process.
- **Enhanced Monitoring and Reporting:** Robust systems are necessary for tracking progress and reporting outcomes efficiently and effectively.
- **Defined Financial Resources:** Clear budget allocations and funding parameters are crucial for the successful execution of goal activities.
- **Acknowledging Achievements:** Regularly celebrating successes and progress is important for maintaining momentum and morale.

Insights from other strategic plans suggest incorporating diverse perspectives and maintaining clarity to improve effectiveness. Specifically, including a range of viewpoints ensures that the plan benefits from varied experiences and insights, which can lead to more comprehensive and innovative solutions. Likewise, clear communication and well-defined goals foster improved effectiveness by providing a shared understanding of objectives and expectations by reducing ambiguity and aligning efforts across different levels of the organization. To summarize, the key insights and themes from other successful strategic plans include:

- **Incorporation of Diverse Voices:** Incorporation of a wide range of perspectives creates more comprehensive and inclusive plans.
- **Conciseness and Clarity:** Shorter, focused plans are easier to communicate, comprehend, and execute.
- **Systemic Vision Alignment:** Alignment of institutional plans with broader systemic goals enhances coherence and contributes to a unified direction.