

Site Planning in a Strategic Context in Temple, Texas

In the Temple Independent School District, the success of strategic planning is evident in increased community and parent involvement, renewed public confidence, and a sense of control over the future.

Trust me! Site planning in the context of strategic planning allows each school in the district to discover its own distinctive character and to use all its talents and resources to fulfill the district's mission while at the same time realizing its own extraordinary goals.

In the fall of 1989, Temple Independent School District in Temple, Texas, had adopted the strategic planning process and discipline of Bill Cook (1990), director of Cambridge Management Group. As our district plan began to unfold, district leaders were faced with deciding how campus planning should be refined. Several years ago, the district had trained campus principals and staff members in effective schools research, and our campus plans were products of that effort. Now we were challenged to find ways to relate campus-level site planning to district-level strategic planning. In the spring of 1990, we determined that we would conduct our site planning within our strategic context.

The District Plan as a Framework

The leadership team decided that campuses should use the exact same process and discipline as the district. The district plan would provide the framework in which campuses would operate; campus planners would forge their own paths in fulfilling the district's mission.

Each campus would establish a



At Reagan Elementary School's first site-planning session, parents, community leaders, administrators, and teachers worked together to outline their belief statements.

planning team composed of a cross section of school personnel, parents, and community leaders from their school attendance zone. Members of this planning team would participate in a retreat to define beliefs, mission,

objectives, and strategies and then analyze the strengths and weaknesses of the campus organization.

This design seemed logical for several reasons. First, people in Temple were becoming familiar with the ter-

minology and thinking of strategic planning. Second, the district had had tremendous success with strategic planning. Community and parent involvement undergirds a good school district and nurtures the district in its efforts to become high achieving—our community was becoming actively engaged in transforming its schools. More than 250 community and school people participated in the development of the district's plan, and site planning in a strategic context was a wonderful opportunity to expand this active involvement to every campus. Third, the district had adopted a policy to use participative management at all levels of the organization, and with effective site planning, power could be decentralized. As Fedderma (1990) explained, "It is inefficient to continue to make all key decisions in a central location. . . . People throughout the organization feel powerless over their professional destiny." Furthermore, full implementation of the district's plan would require campus commitment and ownership. As many as 2,000 more citizens and staff members at campus levels could be involved in site planning.

Decisions Best Made at the Site

Before we announced this site planning process to campus leaders, the central office team discussed what decisions could be made at the campus level. Since in Cook's (1990) words, "only autonomous units can do strategic planning," we had to determine what site planners could do. We decided that campuses could relate to the district much like the branches of a business or an arm of a holding company: by finding and following their own particular goals in achieving the district's mission. As power was decentralized, we reasoned, the branches should not feel they were competing with other branches. Instead, they could concentrate on becoming excellent in attaining their own expectations in fulfilling the mission of the district.

Then we discussed resources. We decided that the campuses should allocate and manage resources raised by the district. Even though centralized

control of campus budgets assured equitable distribution of resources to all campuses, central office leaders believed that those closest to students know their needs best and ought to have control of the management of local resources.

Finally, we turned our attention to delineating the roles of the district and the campus leadership. The superintendent, we decided, would teach the mission and values of the district, lead the ceremonies, and guard and nurture the culture of the district; the supervisory staff and the campus principals would emulate the leadership role of the superintendent by sharing these same purposes, expectations, and processes with their staffs.

Budget, curriculum, and staff development were within the campus realm of control. Principals and staff could control assignment of staff, scheduling, program design, and selection and implementation of strategies. They could not decide to tax their communities or float bond issues, nor could they establish policies and procedures that would require actions of others at other campuses; for example, they could not establish a district discipline plan, alter the district's school calendar, or build new wings on their buildings.

The Climate for Success

After central office staff clarified the relationship between the district's strategic plan and the campus site plans, we were ready to create a receptive climate for changing the planning process at the campus level. We held a full-day training program on strategic planning, site planning, the relationship of the two, and the planning procedures the district would follow.

Subsequently, principals began communicating to their publics about site planning. Campus leaders made numerous calls to solicit members for campus planning teams and action teams, spoke to parent/teacher organizations, and sent home announcements in campus newsletters.

The four "Cook-trained" internal facilitators coordinated with principals to establish dates for the first planning session and to begin selecting their planning team members. Principals worked hard to guarantee a good

cross section of the campus community and to guarantee people of good faith as members of the site planning team.

The Site Planning Process

The site planning process was made up of several key elements:

Retreat. Each site retreat agenda began with a discussion of the reasons for site planning, the process and discipline for site planning, ways to integrate site plans with district planning, how to go about building consensus and how teams should function, the particular district and site realms of control, and effective schools research.

Vital signs. We asked campus principals to develop a "vital signs" package for all members of the planning team. This information would include details and facts about the health of the campus: test score results, staff make-up, student demographics, programs, student and staff schedules, parent support groups, and recognitions.

Belief statements. Before analyzing the district's belief statements, each campus developed and clarified its own set of beliefs. This process allowed each campus planning team to begin to develop a consensus approach and strong support for its own campus, the plan, and each other. Team members quickly began discussing student achievement, the role of schools, the role of parents, and the expectations of the community. Then they began to look creatively at issues related to the success of every child at their campuses.

Just as important, school community leaders began clarifying the bedrock beliefs of each community. Then, an amazing thing happened: a common core of beliefs emerged at each campus that paralleled the statement of beliefs at the district level. This occurrence led us to draw two conclusions: (1) our district and campus planning team members truly represented a cross section of our community, and (2) as divergent as this community is, it has a common core of beliefs.

After developing their own site belief statements, the campus planning teams compared their belief statements to the district's beliefs. They then discussed any additional beliefs

of the district's planning team and clarified any concerns.

Mission statements. The next step was for campus planning teams to create their own ways of fulfilling the district's mission. After careful analysis of the district mission, the site planning teams defined the functions and purposes of their schools and discussed the distinctive traits of each campus. They also discussed the district's decision to become outcome driven rather than process driven and agreed to follow the district's lead in that regard.

Internal/external analysis. Next, teams conducted internal and external analyses, discussing strengths and weaknesses, demographic, political, socioeconomic, and educational trends, and technical/scientific factors that affected education at each campus. Since the district itself is an external factor that influences each campus, it was analyzed as a political factor. Before the end of the first day, each campus team had established its school's greatest threat and greatest opportunity.

Objectives/strategies. The next day, each campus team began establishing two or three student outcome and strategy objectives essential to fulfilling its mission. They shared and discussed objectives from the district's plan before writing campus objectives. As with the campus mission statements, the primary function of these campus objectives was to guarantee the achievement of the district objectives. With expected outcomes clearly stated, the campuses established strategies essential for achieving the objectives.

Action plans. Following the district's process, each campus established an action team for each strategy. These action teams, composed of a cross section of the staff and community, spent approximately two months determining action plans for individual campuses. Action team leaders then presented the plans to the site planning teams at a second retreat.

The campus plans were approved by the planning teams, after which the principals presented them to the superintendent for approval. The principals and a team of leaders on each staff, along with selected members of the planning team, assigned the action

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plans to individuals for implementation. Under the supervision of the principals, all action plans would be reviewed quarterly to determine progress. Annual updates on site plans would also be conducted.

We discovered that campus teams were "biting off" pieces of the district's action plan they believed they could successfully "chew" within a year or two. For example, the district outcome-based education (OBE) action plan called for campus-level rather than district-level implementation. During site planning, campuses identified OBE as a strategy. So the actual achievement of the district's plan will be attained through campus commitments to their own missions, objectives, and strategies.

Responsibility and Harmony

All campuses are now working together to fulfill the district's mission. Each campus is assuming responsibility for discovering its own particular niche and achieving its goals. Each campus is doing its part to guarantee success for every one of its children every step of the way.

People in Temple are developing renewed confidence in and enthusiasm for their school system. Parents believe

they can and do make a difference in the education of their children; they are learning that their ideas are valued, listened to, and occasionally implemented at both district and campus levels. Educators, too, feel a sense of control over the future. They no longer feel hopeless and powerless.

District leaders are beginning to think through all problems in a strategic way. They've learned to ask themselves questions like, *What do we believe? Is this in the best interest of children? Is this in line with our mission?*

At the end of one of the site planning retreats, a principal summed up our hopes in an eloquent speech comparing the planning process to a highly polished, red marble apple she held high in her hand. "We want to remember this moment with this symbolic marble apple..." she said. "Marble is made of a variety of diverse materials melded together to create a beautiful, new, strong, intricately designed substance. Such is our team—a diversity of talents, ideas, and abilities working together beautifully to create a new school environment for our children. As we all focus on our campus mission, we become marble—diverse talents melded together as one while enhancing each individual's uniqueness." All members of the planning team applauded, then cheered.

Schools are the playing fields for the actions of the district; leadership at the campus level is critical for leading people to extraordinary efforts to make a difference in the lives of children. Site-based planning in the context of strategic planning gives the school and the district the opportunity to work together in harmony to ensure success for every child in the 21st century. □

References

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