

# APPLIED STRATEGIC PLANNING

## A Crafting Process for Setting Measurable Objectives

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*An 18-month strategic planning process culminated in the development of a set of core values, a mission statement, strategic objectives, and financial goals to meet those objectives for the San Diego Agency for Jewish Education. This strategic plan, elements of which are displayed at each board meeting, guide the board's decisions as it maximizes the use of scarce resources and provides a vision for the next 5 to 7 years and on into the next century.*

### INVEST IN THE FUTURE OF JEWISH EDUCATION

What would make 15 board members don tee-shirts sporting the logo of the Agency for Jewish Education (AJE) on a Sunday morning? That is what everyone wanted to know when AJE board members appeared at Super Sunday in blue shirts that prominently displayed the AJE logo and urged "Invest in the Future of Jewish Education."

"This was one of the strategies we learned as a result of our recently completed strategic planning process," answered the president of the AJE. "We have often thought our Agency was one of the best-kept secrets in San Diego. We are now developing a marketing plan for the Agency for Jewish Education."

Eighteen months of meetings, letters, phone calls, reading materials, and a community scan that included input from AJE Board members and 47 lay and professional leaders of our Jewish community culminated in the development of a strategic plan, core values, and a mission statement that provide AJE a vision of where it should be as it prepares for continued educational leadership in the 21st century.

### PLANNING PROCESS

In 1985 the AJE completed its first long-range planning process. At that time two members of the Jewish Educational Services of North America (JESNA) staff served as

consultants. Although every recommendation of the plan may not have been carried out completely, all proposals and activities that later boards deemed significant were accomplished. Six years later, in 1991, the AJE Board voted to begin another cycle of planning for the future.

Its choice of a strategic planner was an easy one. One of our board members introduced us to Dr. Ruth Riedel, the chief executive officer of a large not-for-profit health association in San Diego. Dr. Riedel had training and experience in strategic planning and excellent references. She was prepared to teach and lead us through this process. We in turn led her through the intricacies and politics of the Jewish community.

The financial arrangements were not quite so simple. The AJE did not have sufficient funds in the budget, nor was it able to acquire a special allocation for this process. A lay person, who is keenly interested in Jewish education, was invited to be our financial partner in the planning process. He agreed to donate the \$6,000 fee for our consultant. The AJE was to absorb all related costs, such as meals, secretarial services, and mailings.

However, in the eighth hour of our Strategic Planning Team Retreat, which was designed to clarify agency values and craft a mission statement, it became clear that we needed one more full-day or two 5-hour meetings to complete the task. Our consultant volunteered to donate her time. Our fi-

nancial partner suggested that we compensate our consultant at half of her usual rate and agreed that he would also donate these funds.

We arranged for our financial partner to meet our consultant before we undertook any further activities. This meeting was so positive that our financial partner became interested in the process and in serving on the Strategic Planning Steering Committee. He subsequently took an active and important role in our entire planning process and, even though he has not accepted a position on our current board, he has agreed to chair a major AJE committee.

### **Planning to Plan**

The first phase of our Applied Strategic Planning Process began with a meeting of our steering committee and our consultant. Steering committee members were selected because of their commitment to and experience with the total Jewish community. The 12-person steering committee included six AJE board members, one synagogue education director, one day school headmaster, one synagogue youth director who also teaches in the Community High School of Jewish Studies, one native San Diegan who has been active in many facets of the Jewish community, one representative from federation, our financial partner, and the executive director of the AJE. Since we are a small agency no other agency staff were included in the steering committee. Our Community High-School principal, who

was new to the AJE, was included in the Principals Panel.

The Strategic Planning Steering Committee was introduced to the strategic planning process and its requirements at the first meeting. Time commitments expected of participants were discussed, and a Strategic Planning Team (who would later join the Steering Committee for a 1-day retreat) was selected. Ideally, a Strategic Planning Team should have no more than 12 members. However, since we were concerned that stakeholders be part of the entire process and since San Diego County is geographically a very large area, the Team numbered almost 20 individuals. The planning steering committee identified stakeholders—those whom the AJE served or might serve, those with whom we interacted on a regular basis, and those who supported us—and determined a time frame to achieve our Applied Strategic Plan.

Since we wanted to involve federation and its agencies, as well as representatives of our constituents in our process, we formed six panels of stakeholders and invited them to meet with our consultant. Each panel consisted of a maximum of 12 individuals. The groups represented principals, teachers, parents, federation, rabbis, and executives of other agencies. The Steering Committee tried to include a panel of unaffiliated individuals, but was not able to identify a sufficient number to form one.

The Steering Committee identified these questions that the strategic plan should answer.

### **QUESTIONS TO BE ANSWERED BY THE STRATEGIC PLAN**

- What is the purpose or mission of this organization? Why does it exist?
- What vision does the organization have about what it might become in the future?
- What services does this organization provide? What services should it provide in the future?
- Who benefits from these services? How might this clientele change in the future? How might the organization respond to these changes?
- Given the surrounding environmental conditions and the current capability of the organization, where should it concentrate its efforts and resources to carry out its vision of the future?
- What performance measures will be used to track implementation of these priorities?
- What efforts will be made to revise the organization's priorities as conditions change?

Our goal of geographic dispersion and gender equality in our panels and in our Strategic Planning Team was achieved. Most synagogues and branches of Judaism were also represented. Our consultant spent 2 hours with each panel, learning their perceptions of the strengths, weaknesses, opportunities, and threats facing the AJE.

#### Values Audit

The Steering Committee, augmented by the members of the Strategic Planning Team, attended a 1-day retreat where both individual and organizational values were defined. Core values, those that permeate the organization and drive decision making, were noted. A statement of AJE Core Values was crafted.

Having met with each of the panels for approximately 2 hours, our consultant reported on the priorities and weaknesses that our constituents noted. Among the priorities identified were (1) better marketing and publicizing of the AJE; (2) providing leadership for Jewish continuity and Jewish family education; (3) providing continuing educational and professional services to teachers, principals, and the community; (4) focusing on the High School of Jewish Studies and its curriculum; (5) adopting a

strategic focus (do fewer things and do them well); and (6) continuing to serve as a coordinator for Jewish education in San Diego County.

When asked what the AJE does best, respondents suggested the following:

- Professional development and training for educators were well done.
- The collection of AJE resources available to the community was good.
- The classes, conferences, and Jewish experiences provided for the general community were worthwhile.
- The staff of the Agency and its consultation services were a plus.

Among the weaknesses identified by the panels were insufficient staff, inadequate financial base, lack of marketing, insufficient outreach to community, and lack of authority to make decisions in the community.

#### Mission Formulation

What was originally planned as one full-day retreat in which we hoped to craft our mission statement needed to be extended to include two additional 5-hour sessions. In fairness to our consultant, she initially requested two full-day retreats; we allowed

#### CORE VALUES

1. Jewish education is essential to Jewish survival.
2. Jewish education is a *lifelong* process.
3. Jewish education includes both formal and informal experiences.
4. The AJE is an advocate for Jewish education in the community.
5. The AJE promotes the dignity and legitimacy of a wide range of Jewish expression.
6. The AJE promotes professional development for Jewish educators.
7. The AJE is committed to maintaining high-quality programs and services that are sensitive to the needs of our community.
8. Facilitating consensus and collaboration among Jewish educational resources, organizations, and agencies is an important (crucial) role for the AJE.
9. Collaborative planning for Jewish education in San Diego County is a critical role for AJE.
10. The AJE must acquire material resources in order to professionally design, implement, and evaluate its programs.
11. The AJE must retain the confidence and respect of the Jewish community.

### **AGENCY FOR JEWISH EDUCATION MISSION STATEMENT**

The Agency for Jewish Education is the central advocate for quality Jewish education in San Diego County dedicated to:

- Respecting the dignity and legitimacy of a wide range of Jewish expression;
- Planning, initiating, implementing and evaluating formal and informal educational experiences;
- Facilitating collaboration among organizations involved in Jewish education;
- Providing programs for the professional development of Jewish educators.

only one in our planning. Members of the Strategic Planning Team and our consultant graciously volunteered their time for the remaining two 5-hour meetings of the Team.

The Strategic Planning Team constructed several possible mission statements. Each was scrutinized to ensure that it embodied our Core Values. When we finally reached consensus on our mission statement, we felt a great sense of achievement. The mission statement defines our *raison d'être* and was the foundation upon which we built our strategic objectives. The Strategic Planning Committee presented the Core Values and mission statement to the AJE Board for their input before the strategic planning process was continued.

#### **Strategic Business Modeling**

The Strategic Planning Team studied the strengths and weaknesses of the AJE, as identified by the panels, consulted the Core Values and the mission statement, and determined strategic objectives (in priority order) for the Agency.

Neither the panels nor the Strategic Planning Team suggested activities be cut from the present responsibilities of the Agency. Some of the strategic objectives therefore include objectives that already exist. Numbers I, II, and VI are essentially new. Strategic objectives numbered III, IV, and V include areas in which AJE already provides services.

#### **MONITORING AND OPERATIONALIZING THE STRATEGIC PLAN**

Implementing our new strategic objectives remains a challenge. What would each new objective cost? Where would we find the funds to make our strategic objectives a reality? The strategic objectives and their projected cost were presented to the Board of Directors of the AJE for their discussion, suggestions, and approval. The board approved the plan and mandated that it be included in our budget for the following year with the understanding that no "strategic planning" money be expended until it is collected.

After the AJE Board approved the strategic plan, its strategic objectives, and financial implications, the AJE President (formerly the Chair of the Strategic Planning Process) appointed a Monitoring/Oversight Committee with the responsibility of ensuring the implementation of the strategic plan during the next 5 to 7 years. The current President is the chair of the Monitoring Committee; an AJE vice president and treasurer are committee members, and both have significant committee responsibility. Additional committee members, both board members and non-board members, have responsibilities for specific subcommittees. A subcommittee of the Monitoring Committee worked with our consultant to define some measurable objectives by which we could

**STRATEGIC OBJECTIVES**

- I. Taking the lead in Educational Planning for the San Diego Jewish community
  - A. Facilitating collaboration among organizations involved in Jewish education
  - B. Articulating and promoting a pluralistic vision for Jewish education
  - C. Advocating planning and evaluation in Jewish schools
  
- II. Providing leadership for Jewish Family Education
  - A. Is an overriding concept related to effective education
  - B. Model development or replication, start-up, and support are needed
  - C. Technical assistance to synagogues, schools, etc. should be provided
  
- III. Providing programs for the professional development of Jewish educators
  - A. Large group in-service training for all educators
  - B. Special classes as required by teachers/principals
  - C. Workshops for principals and heads
  
- IV. Consulting, training, and providing technical assistance (support) to agencies, schools, and other organizations; and assuming a brokering function for such service offered by others
  
- V. Educating Jewish Teens
  - A. High School of Jewish Studies
  - B. Israel Programs
  
- VI. Developing clout, marketing, publicizing the AJE
  - A. Marketing is seen as a means of implementing any and all strategic objectives/lines of business
  - B. Put this Agency into the public focus
  - C. Image development
  - D. Market existing programs and service through print media, calendar, etc.
  - E. Implement a grand strategy for improving AJE's image and respect in the community

monitor and measure progress toward our goals.

Committee descriptions for the Agency for Jewish Education have been studied and rewritten so as to conform with our strategic objectives. This was done at the suggestion of the Monitoring/Oversight Committee.

Several members of the Strategic Planning Team indicated they would be pleased to serve on the board or on our committees. Our financial partner declined to serve on the board, but agreed to chair our Marketing Committee. His creativity and clear thinking are bonuses for the AJE. Since

many participants in our Strategic Planning Process are intimately connected with the AJE, our strategic plan and its objectives will drive and guide our agenda during the coming year.

The AJE Board and the Monitoring/Oversight Committee will need to be resolute in keeping those individuals not on our board involved in the Agency because they have a stake in our plan and are potential leaders for the AJE. A special "New Board Member Strategic Plan Overview" session may need to be presented each year so that our Strategic Plan remains in the forefront

of our thinking as we plan activities each year. This does not mean that adjustments cannot be made. The intent is that we keep our Core Values, our mission statement, our strategic objectives, and our monitoring plan visible at all times so that they guide the board when decisions are made.

#### **Short-Term Goals and Activities to Ensure Compliance**

The Monitoring/Oversight Committee has developed a specific timetable for its responsibilities. It must also ensure that measurable performance objectives are specified and that AJE activities are compared to these indicators. In some cases AJE activities are already in place and measurable. For example, the AJE already provides teacher workshops and works collaboratively with principals. In other instances, activities are just beginning, and measurable objectives need to be written. In addition to monitoring performance objectives of the AJE, the Strategic Plan will be presented to our constituents and to those who participated in our panels. These individuals need to be aware of our Strategic Plan that they helped form.

#### **Progress in Reaching our Strategic Objectives**

To achieve Strategic Objective II, we have recently formed a Community Jewish Family Education Consortium. Called our *Making Jewish Memories Team*, 26 of its members (funded by a grant to the AJE from the Jewish Community Foundation of the United Jewish Federation of San Diego County) studied together at the Whizin Institute for Family Education at the University of Judaism during the summer of 1993. These individuals are working together during the 1993-94 school year to plan outreach programs to the unaffiliated. A community group of lay people is also working on the outreach programs. A part-time professional, funded by The Continuity Task Force of the San Diego United Jewish Fed-

eration, is now working with the *Making Jewish Memories Team*. She helps the Team plan outreach activities, provides technical assistance to schools and synagogues, and helps evaluate family education programs.

Our first strategic objective, taking the lead in educational planning for the San Diego Jewish community, is also in progress. The federation has asked the AJE to staff an Educational Planning Task Force with responsibility for making recommendations of educational priorities to the federation.

#### **CONCLUSION**

Although it is too soon to determine progress toward goal achievement, it is appropriate to reflect on our planning process. The strategic planning process is designed to teach a leadership group to envision the future of an organization and provide appropriate criteria for decision making. From the development of the values audit, the Core Values statement, and the mission statement emerged consensus, ownership, and direction. The selection of strategic objectives flowed directly from the aforementioned activities.

The Strategic Plan of the Agency for Jewish Education has helped the Executive Board and the Monitoring/Oversight Committee envision the future of the organization. This is reflected in (1) the rewriting of committee job descriptions, (2) the development of more specific requirements for board membership, (3) the choice of individuals being selected for the board, (4) a new and significant emphasis being placed on marketing the AJE, (5) the realization that the board must raise more money, and (6) an awareness that all activities in which the AJE participates must flow directly from the strategic objectives and their measurable performance indicators. The Core Values, the mission statement, and the strategic plan itself provide the criteria for decision making. These are displayed at each Board Meeting so that board members can keep

our goals in mind as decisions are made.

We heartily endorse strategic planning as a method of envisioning the future of an organization and conserving scarce resources. We have our mission statement and our strategic objectives in our minds, and also in our view, whenever we meet.

We plan to measure our progress toward our goals and evaluate our programs in terms of our goals. We have even begun to use a modified strategic planning process as a template for committee work and educational planning in the community.