Strategic Planning for Educational Technology Excellence

Dr. William Bozeman
Professor Emeritus
University of Central Florida

George Perreault
Director
Orange County Public School

WILLIAM BOZEMAN & ASSOCIATES
Systems Planning, Research and Evaluation

When you don't know where you're going, any road will get you there.
(Lewis Carroll from *Alice in Wonderland*)

Strategic planning is essentially a process that enables an organization or unit within an organization to design where it should be going over the next 3 to 5 years, how it is going to get there, and how to know if it, in fact, got where it was supposed to be going. When Instructional Technology and Library Media (ITLM) Director George Perreault and the Orange County Public Schools embarked on the development of the ITLM Department's strategic plan, the belief was that a sound strategic plan is the single most important element in achieving educational excellence.

The Setting

Orange County Public Schools (OCPS) system is the fourth largest independent school district in Florida and the 10th largest district in the nation. The district is divided into five regional learning communities to serve approximately 179,000 students attending 180 schools. OCPS is located in Orlando, Florida and is the second largest employer in Central Florida with approximately 820 administrators, 12,056 instructional personnel, 7,865 classified workers and 578 part-time positions.

A majority-minority school district, 64% of students are White, 28% are African American, 32% are Hispanic, 4% percent are Asian/Pacific Islander, 3% are multi-cultural, and 1% are American Indian or Alaskan Native. Students represent 212 countries and speak 166 different languages and dialects. More than 51 percent (51.25%) of OCPS students are eligible for free/reduced lunch. The district has 120 elementary schools, 37 middle schools, 19 high schools, four exceptional education schools, five technical education centers, 23 alternative education sites and 22 charter schools. The district's mobility rate by grade level is: elementary schools 35%, middle schools 30% and high schools 31%.

Process

The presumption that a sound strategic plan is the single most important element in achieving educational excellence in no way diminished the significance of faculty, media specialists, educational technology personnel, or school leaders. It was clear that appropriate

curriculum and instruction, an adequate infrastructure, a supportive climate, and other such areas were crucial. Strategic or long-range planning, however, could provide the unique opportunity to view the system holistically, with a focus toward the whole organization rather than isolated and seemingly independent components. Furthermore, it was recognized that the plan must be flexible and practical while serving as a guide to implementing programs and initiatives, evaluating these programs, and making modifications when necessary. A strategic plan must reflect the thoughts, ideas, and values of the stakeholders and shape them consistent with the district's mission and purpose. In the end, the plan must assist in establishing purposes and priorities to better serve the needs of our most precious members – the students.

The ITLM planning team had several important goals. First and foremost, the plan should guide educators toward improvement and excellence. Such a plan must be operational and sensitive to school and district-specific needs—not just a collection of clichés, platitudes and jargon that frequently fill strategic plans and that would never provide real direction. Secondly, it was essential that important stakeholders be involved throughout the planning process. In fact, those persons involved should include not only Instructional Technology and Library Media (ITLM) personnel but also media specialists, principals, and technology experts. Additionally, a decision was made at the onset to not spend months in a formal needs assessment and analysis of areas potentially in need of improvement. If the appropriate stakeholders were involved in the strategic planning process, they would be aware of and sensitive to the relevant ITLM issues.

After a brief period of pre-planning, the ITLM Department initiated its planning activities guided by a process termed *Breakthrough Thinking* under the direction of Dr. William Bozeman. The strategies employed in *Breakthrough Thinking* recognize that leaders and managers have been instructed in planning and problem-solving processes derived from classical scientific methods. While such processes can be invaluable for certain activities, notably research and systems analysis, their very nature (that emphasizes examination of components) can hinder one's seeing the complete and true picture. *Breakthrough Thinking* is an alternative to such classical problem-solving methods, offering a systematic approach to planning, problem solving, change and improvement. The strategy involved four intuitive phases:

➤ **Purpose and values determination**. What values and beliefs are critical to successful technology and library media utilization? What specific functions will the solution system achieve if accurately based on beliefs and values of the stakeholders?

➤ **Possible solution generation**. How can the functions be best achieved if no constraints (e.g., resources, time, feasibility, etc.) are forced upon the design?

➤ **Target plan selection and details specification**. How can we shape the ideas into an idealized plan or solution system leading to details of the recommended system?

➤ **Implementation and evaluation**. Action plans may include the development of operational components, specification of timelines and performance criteria, and consideration of political forces.

A set of general principles guided the planning process and strategy:

1. Try to not dwell on present problems, challenges, and uncertainties. Attempts to move in this direction should be sanctioned.
2. Ascertain the purpose of what is being done. Continually ask: "Why. . .?" and "What is the purpose of that?"
2. Direct efforts toward the development of the "ideal solution" or "solution after next" rather than toward repairing what exists.
3. Devise a target plan at which to aim.
4. Include in the process as many people as possible who will be affected by the plan.
5. Do not worry about everything at once. Different activities have different purposes and may be treated separately.
6. Gather information and data only as needed to answer specific, essential questions.

These principles, whether considered individually or collectively, are generally accepted by successful leaders and professionals in all fields without question. In real-world planning, they are often not followed because of an absence of a well-defined, purpose-oriented strategy, and belief in a "business as usual," "study the problem," "if it ain't broke…" management style.

Developing the Plan

The ITLM Department's strategic planning began with the formulation and conceptualization of mission, beliefs, and values which lead to purposes and plans. The initial phase was a meeting involving teachers, media specialists, principals, and technology experts. The group then engaged in a modified nominal group technique and small group dialogue regarding their beliefs about educational technology and media systems. Beliefs were defined to be essential, fundamental values and convictions and should provide the context within which teaching and learning occur. These discussions yielded over 100 belief statements. The large group was then divided into subgroups that refined and discussed beliefs that appeared relevant to their respective target area. These discussions yielded six beliefs regarding the services of ITLM.

The next phase of planning was directed toward purpose determination. Essentially, target area subgroups were asked to develop a manageable set of purposes that present the reason, utility, need, or mission of the area as shaped by the expressions of beliefs and values. In a sense, the groups were answering the questions, "Do we really know what we are trying to accomplish?" and "What are our clients' purposes?" Working on the right purpose replaced the conventional tendency to work on a perceived problem. These discussions yielded nine clear and succinct purpose statements for three target areas termed *Professional Development*, *Support*, and *Visioning*.

The next phase of the strategic planning required committee members to contemplate strategies that might accomplish each of the respective purposes for the three areas. Again, no constraints were accepted regarding existing resources and all work was shaped by the established beliefs and values.

Given the refined sets of purposes for each target area, the group members were challenged to develop strategies for each purpose. In this application, strategies are basic directional decisions on what should be done to accomplish the purpose. This work resulted in a total of 17 strategies for the three target area (*Professional Development*, *Support*, and *Visioning*).

Based on the strategies, the members of the three groups considered action plans associated with each of the 17 strategies—the important actions necessary to realize these directions or strategies. Each strategy, as shaped by purpose, led to numerous action items that

included details such as work to be performed, personnel responsibilities, evaluative measures, and timeline for implementations. This work yielded 73 action statements associated with the various strategies.

Following the draft of purposes, strategies, and resultant action plans was the need to consider human resources. It was immediately clear that ITLM did not have adequate personnel to accomplish the work. In the spirit of resources following good ideas, Perreault was provided five new ITLM positions to address the actions detailed in the strategic plan. Obviously, these persons were a major new asset, especially given these times of declining budgets in education.

A Plan in Action

Schematically, the overall process resembled a tree. The trunk of the tree was the set values and beliefs. Limbs which grew from this "beliefs trunk" were purposes. Branches from the "purposes limbs" were strategies to accomplish the purposes. From the "strategy limbs" produced, in turn, branches of action plans supported by requisite human resources. Ownership, involvement, and commitment are three fundamental values that educators, parents and community members must recognize in order to bring about continuing educational change and improvement in their schools. If these parties do not embrace the strategic plan, even the best efforts will be doomed to failure.

While the planning process described here is a logical strategy, it is not necessarily an intuitive one given individuals' experience with traditional approaches. At the onset, some members of the group were frustrated by the perceived lack of progress in putting "pen to paper" and the amount of time talking about goals and needs as opposed to tackling the gaps they already knew existed. Other group members felt a need to gather data through a comprehensive needs assessment. The facilitator acknowledged this early on with the admonition that resources follow good ideas, and that for a plan to really garner support, we needed to approach the process from a "What are our beliefs and purposes?" perspective. The tendency to focus on the current condition, lack of resources, problems, and staffing is counterproductive and can become an exercise in whining and complaining rather than developing a vision and a comprehensive plan.

In addition to a sound strategic plan, two additional and powerful outcomes should be mentioned. In terms of team building, stakeholder collegiality, cohesion, and communication

were visibly enhanced during the planning process. Secondly, in regards to time efficiency, while one cannot conduct a true A/B comparison, the volume and quality of products developed in a matter of weeks was truly impressive as contrasted with conventional planning methods.

At the end of the day, planning, change and improvement are not just about goals, objectives, strategies and evaluation. They are about relationships among people, harnessing individuals' talents, skills and intellects, and leading a diverse population within a complex 21st century environment.

The ITLM Strategic Plan is now a roadmap and timeline to improve offerings, increase student success, increase enrollment, and serve the central Florida community with relevant career and technical programs. Is the work complete? *Never*. An effective strategic plan must be a living document, continually edited and updated. If the members of the Orange County ITLM Department accept this premise, the plan can indeed guide educators toward improvement and excellence for many years.

William Bozeman is Professor Emeritus at the University of Central Florida and CEO of *William Bozeman and Associates*. He can be contacted at bozeman@bozemanassociates.com.

George Perreault is a Director in the Orange County (Florida) Public Schools. He can be contacted at George.Perreault@ocps.net.

Breakthrough Thinking is the product of the work of Dr. Gerald Nadler, IBM Chair Emeritus in Engineering Management at the University of Southern California and also President of Breakthrough Thinking Inc.

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