

## Strategic Plan or Continuous School Improvement Plan (CSIP)?

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**To meet Standard 8 expectations for schoolwide planning, is a board-approved strategic plan required, or an internally focused Continuous School Improvement Plan (CSIP), or both?**

**Background.** Within the domain of school improvement planning there exists a wide variety of definitions and interpretations of terms. Some define “mission” the way others define “vision”; “goals” can be defined as broad statements supported by desired “objectives”, while others will find “goals” meaningless unless they are SMART goals (specific, measurable, attainable, results oriented, and timebound). Most would agree that when it comes to planning for schools, the focus should not just be on buildings and finances and operating ratios, but effective school planning must pay significant attention to “expected student outcomes”. And when we reference school planning, are we talking about strategic plans, long range plans, operational plans, strategic financial plans, continuous improvement plans, action plans, or all of the above?

Standard Eight in the REACH 2.1 accreditation protocol requires the school “with appropriate stakeholder input, [to] systematically develop and annually update a continuous school improvement plan (CSIP).” The justification for this standard says “The CSIP may include areas where the school is pursuing its vision, developing innovative and creative ideas, pursuing academic and faith development, and establishing new strategies for growth and development.”

A common question is whether a board-adopted school-wide strategic plan is a CSIP, or the CSIP is a separate document from a schoolwide overall strategic plan. *The definitive answer to this is “maybe” – it depends on the content of each document.*

**Schoolwide Strategic Plan (SP) or Continuous School Improvement Plan (CSIP)?** There are significant differences between a school wide strategic plan and a mission focused programmatic operational plan (CSIP).

Strategic plans are generally developed by the board and the head of school, with some input from stakeholders, and focus on viability-related issues: enrollment, tuition, student-faculty ratio, compensation, cash reserves, fundraising, governance, and facilities. Often board-adopted strategic plans are referred to as a strategic financial plan—the financial components of the plan are critically important to the plan.

The CSIP is a mission-focused operational plan that includes specific programmatic improvements for the school to effectively deliver on the school mission. CSIP’s are generally developed by school administration and faculty with inputs from other stakeholders, based on recommendations gained through the accreditation process, and focused on the assessment of student achievement and expected student outcomes. The final authority for a strategic financial plan is the school board; the final authority for a CSIP is the head of school.

It is possible to combine or fully integrate a CSIP with an overall strategic financial plan, but the danger of the combination is that board members may want to influence specific curricular decisions (a faculty and administrative function) and faculty members may seek to influence things such as student-teacher ratios (a board function). However, assuming that both groups value broad input yet respect differing operational authority, the advantage of effectively combining the two documents is a unified and comprehensive plan that enables greater focus and coordination by the head of school and the school community.

The specific requirement for accreditation is a CSIP, not a strategic (financial) plan. A school can decide whether or not it wants to incorporate the required CSIP into an overall board-adopted strategic plan, or perhaps submit a strategic plan along with a CSIP. If the school chooses to utilize a combination document or an integrated strategic plan, it is essential that the documents are aligned and complementary.

**Key Elements of a CSIP.** A CSIP should focus on specific goals and action plans that will result in greater school effectiveness through improved schoolwide academic and non-academic achievement of expected student outcomes. Thus, a CSIP is operationally focused on more effectively achieving the mission of the school. It is focused on initiatives, programs, personnel, and assessment of progress. Common goals within a CSIP could include student programs, curricular initiatives, professional development programs, spiritual formation plans, athletics programs, guidance programs, reading programs, or any plan for implementing the mission.

There are multiple ways to format a CSIP, and the REACH Standard 8 (p.20) specifies needed components, including goals, time frame, action steps, person(s) responsible, resources needed, due date, evidence of progress, communication, and the expected schoolwide learning to result from this goal.

The head of school “owns” this completed document and utilizes other school leaders, faculty committees, and individual faculty members to implement and report progress on these initiatives.

**Key Elements of a Strategic Plan.** A strategic plan is focused on viability-related issues, and whether or not the term “strategic financial plan” is included in the title, strategic financial goals and realities must be included. To best create a relevant strategic plan in the challenging current economic environment, more schools are embracing scenario planning with three or more scenarios based on different enrollment and financial assumptions. A critical function to the long-term viability of any school is building up a reasonable unrestricted operating cash reserve that will enable a school to handle enrollment swings. A strategic financial plan may have multi-year goals for enrollment, fundraising, tuition and financial aid, facilities, technology, and financial or operational ratios. If there are elements in a CSIP that will require additional staffing or programmatic funding; these initiatives must find their way into the strategic plan. The board owns this process and the final document, and this plan generally defines the priorities for the head of school. There is even a school of thought that the actual job description for the head of school is the strategic plan itself – his or her real job is to implement the plan.

**Best Practice.** There is danger in prescribing a certain best practice for all schools because individual school contexts can vary considerably. It may work very well in one context to have internal teams driving the CSIP process and allowing the board to drive the strategic planning process. Effective planning – for both the CSIP and the strategic plan – must have the participatory leadership, focus, and ownership of the head of school. Whether there is one document or two somewhat depends on organizational preference. Whether one document or two, the resulting process should lead to a flexible, annually updated document(s) that guides annual priorities driven by school leadership. Effective planning processes, and the communication of those processes and plans, can bring substantial unity and focus to a school community. The resulting unity leads to greater effectiveness, efficiency, and financial support for the school.