Patty Hightower, President, Florida School Boards Association, Escambia County: Thank you so much for being here. Welcome to the annual conference.

This morning we are going to be doing some strategic planning. Yesterday the board of directors approved the hiring of Andrea Messina as our next Executive Director. We saw this as an opportunity to look at who we are, who we want to be, what do we want to continue to do and what are some services we don’t currently do that might serve us well. In March we decided we needed a strategic plan and we realized we needed an external group to come in and help us with the process. We had 8 different groups submit a proposals. We selected the Collaborative Labs at St. Petersburg College to facilitate the FSBA’s Strategic Planning Process. Andrea Henning is our speaker this morning. I met Andrea when Governor Scott held an Accountability Summit at Collaborative Labs. When they produced the proposal I had experience seeing how they take the diverse opinions, listen well, and emerge with a cohesive plan for the future. I’m excited that now, we are going to have Vision 2020.

Andrea has over 25 years’ experience leading organizational strategic planning, corporate training functions and leadership development, including the launch of the Collaborative Labs ten years ago, where she has served over 30,000 regional, national and international leaders and has facilitated over 1000 engagements. Prior to the Collaborative Labs, Andrea led corporate training and organizational development functions for fortune 500 companies in manufacturing, hospitality, and communications industries, including: Chrysler, GE, Universal Studios and Cox Communications. Andrea is a certified Co-Active Coach through Coaches Training Institute. Her education includes a BA from Wheaton College, a M.Ed., and post-graduate work in Educational Psychology from the University of Toledo.

We sent out a survey to all FSBA Members for your input on what our future direction and goals should be. We realize it went out at graduation time so we realize we might not have gotten your feedback. We will continue to seek your input in this strategic planning process. There will be two breakouts that will provide you an opportunity to give input into our 2020 Vision, and we hope you will attend one of them today.

Andrea Henning, Executive Director, Collaborative Labs, St. Petersburg College: Thank you, Patty. It’s an honor to join FSBA at this exciting time, with a brand new Executive Director coming in, and the creation of your 2020 vision. I want to thank you for your leadership and investing your lives in our students and setting them up for a successful life through a great education.

Here are our two session objectives this morning. The First Objective, to “Equip you with a Strategic Planning Toolkit that works!” This has been my life’s work for the last 10 years, and I have seen this strategic
planning process work every time (and we have facilitated over a thousand of these). I think you will appreciate this toolkit, because not only will it enable the FSBA to create a 2020 Vision and Strategic Plan, but it will provide tools you can utilize with your Boards in each of your districts. The Second Objective is to “Engage you in FSBA’s Strategic Planning Process in 2015.” The success of this plan depends upon your voice and your involvement in and implementation of the plan.

The Collaborative Labs will become your extended team throughout this Strategic Planning Process, and I’d like to introduce you to our team: Trish, is on the keyboard and is taking all the notes. She will put together the most robust meeting notes you’ve ever received. It is called our Real-Time Record, and that will be delivered to the Florida School Board Association tomorrow, and will be posted on their website. Then we have PJ and Mike our technologists. We use technology and brainstorming software to accelerate the best thinking, and they will be helping to drive that process in the general session and in our breakouts to follow. They will also be taking your pictures for the Real-Time Record. Terrie is our Business Development Officer, she will be helping to facilitate today. Alison Barlow is our Collaborative Labs Manager, she will also be helping to facilitate today. Then we Jonathan, our artist extraordinaire. He will take the conversations he hears today and render a mural of your 2020 vision.

So let’s begin our strategic planning process with some honesty. Please grab a polling device, you’ll find them on your table. “What happens when I say – “Strategic Planning?” Select as many of these as you wish. Let’s be honest, let’s see what you think or feel when you hear the term strategic planning?
Andrea: Ok, many of you think about the binder with 1-inch thick dust on the shelf (1). Items 6 and 7 also were popular. I see a good number of you who responded with item 8 – “You get excited!” Please raise your hands! You are my people! My hope is that after today’s presentation and breakout groups, you will all be excited about the FSBA Strategic Planning Process!
Andrea: Ok, tell me about your experience with strategic planning.

Andrea: The majority have you been part of Strategic Planning Processes within your Boards, and many outside of your boards as well!

Andrea: Get ready, I’m going to unveil this toolkit. On your table, we have a Strategic Planning “fill in the blank” Worksheet. Please fill in the blanks as we share the toolkit this morning. Here’s the Model Collaborative Labs uses for our Strategic Planning process. It’s called Appreciative Inquiry. What we focus on becomes our reality. Are we focused on our strengths or are we focused on our deficits? We have found that it is much more effective to start from a strength-based perspective. We don’t start microscopically, by asking deficit based questions, rather, we start telescopically asking strengths based questions. In this presentation we will unveil the Appreciative
Inquiry 4D Model. It’s simple and yet profound, and it works every time. The First “D” is Discovery. Discovery of the best that is in our organization. On your handout, we have Tool Boxes for each of the 4 D’s. We will also be filling in the Top 10 Golden Nuggets for Strategic Planning that we have uncovered over the years.
Andrea: The first tool in discovery is: **Strengths and Successes**. To build a strong plan, you must begin by understanding the “People Strengths” in the room/organization. We must ask “What are your strengths?” We will now launch several polling slides to highlight the “People Strengths/Experiences” in the FSBA:

**Andrea:** The majority of our members are School Board Members, and we have other important members as well.
Andrea: The majority of you have served 5-10 years, with others across the gamut.

Andrea: The majority are small districts with some that are medium and large.
Andrea: Ok we have some seasoned veterans in the room, and others across the age groups.
Andrea: Ok, so we have lots of parental and grandparental public school experience in the room as well.

Andrea: So, we have, with these polling slides, uncovered the strengths in the experience level in the room.
Andrea: Next, we have what we want to uncover what are the Florida School Boards Association Strengths. We are going to look at the whiteboards, as well as ask for impromptu participation. Let’s start with the first strategic focus area and ask: What are FSBA’s Strengths in the area of: Increasing student achievement through the development of effective school board leadership.

<table>
<thead>
<tr>
<th>Development of Effective School Board Leadership</th>
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<tbody>
<tr>
<td>• Board development /facilitation/onsite workshops</td>
</tr>
<tr>
<td>• Provides resources for local boards</td>
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<tr>
<td>• FSBA leadership training</td>
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<td>• New board member training</td>
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<td>• Legislative advocacy</td>
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<tr>
<td>• Mentoring and networking</td>
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<td>• Certified</td>
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<td>• Chairmanship</td>
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<td>• Master Board Training</td>
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<td>• Committee involvement</td>
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<tr>
<td>• School finance training</td>
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</table>

Comment: FSBA leadership training is extraordinary.

Comment: New board member training.

Comment: Legislative advocacy training and actual legislative advocacy.

Comment: Networking and programs.

Comment: Certified Board program.

Comment: Chairmanship.

Comment: Master Board Training.

Comment: Committee involvement in the program structure.
Comment: Staff.

Applause.

Comment: School finance training.

Andrea: Which one did you find most helpful? So it looks like many of you have benefited from FSBA Training.
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Of all the training you’ve participated in with FSBA, which did you find most helpful (Select no more than two):

1. School Finance Forum 24%
2. Personnel and Bargaining Issues Forum 1%
3. Policy Governance Forum 5%
4. Boardsmanship Forum 7%
5. Ethics Training 9%
6. Master Board Member Training 26%
7. New School Board Member Training 28%

CollaborativeLabs@spcollege.edu
Andrea: Next, let’s go to our second strategic focus area and ask: What are **FSBA’s Strengths** in the area of: **Increasing student achievement through advocacy for public education**.

Andrea: Let’s take a pulse on how many of you have benefited from “Advocacy” activities in the next two slides.

Andrea: Great! So many of you have participated in FSBA’s Advocacy activities.
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Andrea: Now, let’s hear from the audience.

Andrea: Give us more information on what has been helpful in the area of "Advocacy" and why?

Comment: I’ve been to Tallahassee 53 times. The lobbying is so much work.

Comment: I think hearing from the legislative leaders and then going to meet with them as a group.
Comment: It’s helpful to hear how the session is going.

Comment: It goes to Dale Carnegie, it gives you the opportunity to develop a personal relationship.

Comment: I appreciate the legislative updates.

Comment: You get a chance to attend the committee meetings and speak on behalf of a bill.
Andrea: Next, let’s go to our third strategic focus area and ask: What are **FSBA’s Strengths** in the area of: **Communication platforms and vehicles to serve FSBA members**

**Andrea:** What has been effective for you in terms of communication for FSBA members?

**Comment:** Having a chance to work on the legislative committee and coming together to make decisions.

**Comment:** The app available on smartphones.

**Andrea:** Let’s go to our fourth and final strategic focus area and ask: What are **FSBA’s Strengths** in the area of: “**Other**” FSBA Strengths/Successes.

**Comment:** I celebrate what’s going on today and networking.

**Comment:** It’s knowing that you aren’t going at it alone. You have something in common with someone across the state.
Andrea: These are the four strategic focus areas of our plan. The first golden nugget is we need to hone in on 3 – 5 strategic buckets, more than that is too much. Strategic Buckets are containers of all the information that will go into a solid Strategic Plan. They hold everything from goals to strategies to tactics. We have chosen 4 Strategic Buckets for FSBA’s Strategic Plan:

1. Increasing student achievement through the development of effective school board leadership
2. Increasing student achievement through advocacy for public education
3. Communication platforms and vehicles to serve FSBA members
4. “Other” FSBA Strengths/Sucesses

The “other” bucket is always helpful, it’s a catchall bucket for the outliers.

Andrea: The second & third tools in our Discovery tool box are Guiding Principles and Values.
Guiding Principles typically don’t change even when goals or strategies or even leadership changes. They stay with you in all circumstances. We need to have a set of values that we operate within. Quality is often a value and you can see one organization’s definition of Quality here. I recommend organizations not only identify Core Values, but also define each one according to what will best support your organization. Often Guiding Principles and Values are hung on the walls in the hallways to reinforce and hold members of the organization accountable to live these out and operate within these agreed upon precepts.

These are tools 2 and 3 in your Discovery Tool Box. Tool number 4 is the **SWOT** analysis.
Strength and Weakness are generally internal to the organization. These are usually the present focus. Then we are looking outside at opportunities and threats and these are generally external to the organization.

The fifth tool in our Discovery Tool Box is **Stakeholder Input**. We are probably going to send out more surveys or have opportunities for focus groups for FSBA members to continue to provide input into the strategic planning process over the next 6 months. It’s key to get your voice in the planning process.

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**Andrea**: Then we come to the second golden nugget. **Everyone has a Voice**. Involve everyone who is invested in the outcome.

**Andrea**: The next Golden Nugget is to **Have the Right Stakeholders in the Room**. I encourage our clients to think deep and wide when seeking stakeholder input within the organization. From those on the front-line to middle management to executives, even
customers, vendors, funders. Anyone who has a vested interest in your success, should be included in the process.

**Andrea:** Now we are going to go to our second “D” and beam into the future, to the **Dream** phase. We will dream about the **2020 Vision for Florida School Boards Association**, the first tool in the “Dream” tool box is **Vision**. How many of you have put a puzzle together recently? You know you have all the puzzle pieces on the kitchen table. Let me ask, what is the most important tool when you are putting a puzzle together? The box top, right. Because you need to see where you are going before you put the pieces together. So we are going to add the next golden nugget, which is: **Begin with the End in Mind**.
This is a precursor of what you can expect from Jonathan (taken from the vision mural for the Dept. of Economic Opportunity, when we help to develop the 5-Year Plan for the State of Florida). After we determine what the components for FSBA’s 2020 Vision are, Jonathan will illustrate it in a compelling way in a 2020 Vision Mural.

**Andrea:** The next tool in the Dream Tool Box is: **Mission.** What is an organization’s core purpose and reason for being here? The Mission Statement is something that doesn’t generally change often. Setting goals, **SMART Goals** are important in each of the strategic buckets, and that is our third tool in the Dream Tool Box.
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**Andrea:** You can see it has every element of a smart goal. That’s an example.

**Andrea:** Now that we’ve discussed the first 3 tools in the Dream Tool Box, Vision, Mission and SMART Goals, take a look at this next slide and try to determine which is a Vision Statement. These are taken from the Florida Department of Education website. Yes, Number 2 is the FLDOE’s Vision Statement, Number 1 is the Mission Statement and Number 3 shows the Goals.
Andrea: As we consider what we want the FSBA’s 2020 Visionary Goals to be, let’s take a look at the ideas from the member survey we did a couple weeks ago as a starting point. We want to get a pulse in the room and begin thinking about where we want to the Goals for the FSBA to be over the next 5 years.

Choose the Top Two 2020 Visionary Goals for FSBA to Increase Student Achievement through the Development of Effective School Board Leadership:

1. Strengthening the FSBA board through professional development and training 22%
2. Research international and national proven best practices in both education and other industries (not for profit, government bodies) for boards 21%
3. Better partnership with the community: Parents, teachers, faith based, community leaders 27%
4. Communicating effectively across the 67 counties school boards and their members 24%
5. “Other” 6%

Andrea: There is energy around all of them. We will use this for our springboard for today.
Andrea: Here’s the second set of goals that we identified through our survey.

Choose the Top Two 2020 Visionary Goals for FSBA to Increase Student Achievement through Advocacy for Public Education:

1. Communicate the highlights and successes of the public education system in Florida 26%
2. Better partnership with the community: Parents, teachers, faith based, community leaders 26%
3. Increase funding/financial support for teacher professional development 20%
4. Better training for board members to prepare them to be advocates 16%
5. Focus more on local/regional advocacy 11%
6. “Other” 1%

Andrea: Ok, so Goals 1 and 2 are the favorites.

Choose the Top Two 2020 Visionary Goals in the area of Communication Platforms & Vehicles to Serve FSBA Members:

1. Increase social media presence and further develop our App 9%
2. Electronic media- Email and e-newsletters to keep board members informed of events and best practices 17%
3. More webinars and training to share best practices 15%
4. Shorten messages delivered through multiple vehicles. Consistency in the communication 25%
5. More materials and talking points to use locally that are trending across the state 33%
6. “Other” 1%

Andrea: What two resonate most with you?
Andrea: Looks like Number 5 got the most energy: More materials and talking a point to use locally that are trending across the state. That’s very helpful.

Choose the Top Two 2020 Visionary Goals in the area of “Other” Strategic Priorities for FSBA Members:

1. Maintain clear roles of School Board and Superintendents 19%
2. Virtual Education 3%
3. Create positive working relationships with decision makers in Tallahassee so that we are part of the legislative and regulatory conversations 31%
4. Statewide testing policy - straighten out the policy on testing school grades and teacher evaluations 29%
5. Limit testing and evaluations 17%
6. “Other” 1%

Andrea: Finally the “Other” catchall category.

Andrea: Items 3 and 4 have the most energy.

Andrea: When you get to the breakouts, we will ask you to continue to brainstorm what FSBA’s 2020 Visionary Goals should be, and we will have these “starter goals” – gleaned from the member survey, at your tables as a reference to build upon.

Andrea: The 4th tool in the Dream Tool Box: Success Metrics. What gets measured gets done. To the extent possible, add metrics to every 2020 Goal you decide upon.

Andrea: Finally Value Proposition. This is one of my favorite tools in the Dream Tool Box! This is the organization’s quick brand message. This helps you articulate what is the value of the association. It’s also called an “Elevator Pitch,” meaning – you should be able to articulate the value of the FSBA Association in one to two sentences to anyone you may meet on an elevator, in “lay terms.” The components of a Value Proposition include: offerings and services, differentiating features, target audience, then
the benefits that are received, and finally the advantages over competitors. Let’s look at a quick example.

**Value Proposition/Elevator Pitch**

1. Offerings/Services
   - A
   - B
   - C

2. Target Audience
   - A
   - B
   - C

3. Advantages over “Competitors”

**Example of a Value Proposition**

“Use Shopify to create your online store. Everything you need to start selling online – today.”

**Andrea:** So, for the “Shopify” example - The target audience would be anyone who has something to sell online. Shopify’s differentiated services include everything they would need to sell it online. An advantage over competitors might be that Shopify can deliver “today.”
Andrea: At your tables I’d like you to think about Florida School Boards Association’s Differentiators: What differentiates FSBA from any other organization you might consider joining. Then have a table scribe write it down on one of the large post-it notes and we’ll ask several tables spokespersons to share with the full group your thoughts on what Differentiates FSBA from other organizations. These Differentiators can be current or future.

Andrea: Please share what Differentiates FSBA from other associations.

Comment: Future consistent voice, we need one voice.

Comment: We are Florida specific, job specific, we serve all children and we represent a public and democratic model.

Comment: Board developed training relevant to the members, networking, students and parents are the same.

Comment: We are the only organization that’s focused on schoolboard members.

Comment: We would like to have a pack and individual memberships.

Andrea: We will post all of the FSBA Differentiators on that whiteboard and will transcribe them all for the Real-Time Record.
### FSBA Differentiators

- Common Goals
- Support
- Training
- Advocacy
- State Issues – focused on Florida
- Power in Numbers
- Branch NSBA
- Diversity
- Need PAC (future)
- Individual memberships (future)
- Florida Specific – Orange County
- Job Specific – Responsibilities of SB Members
- We serve all children
- Public democratic governance model
- Only statewide organization for school board members focused on education
- Ability to network with other school board members throughout the state
- Valuable training
- Constant framework over the years
- Associated with role of public education advocates and goals
- Professional development relevant to roles
- Resources
- Job-alike membership
- Historical perspective
- Collaboration
- “Sunshine” – communication barriers at local level, FSBA provides opportunities to learn within and “outside” of sunshine with others in like “jobs.”
- Lobbying efforts
- Networking
- Statewide Collaboration
- Specialized group
- Like-minded, same focus
- The quality opportunities
- Networking with peers on common issues
- Organized legislative advocacy

- Development of clout through a PAC (future)
- Board development and training relevant to being a school board member.
- Networking with like members
- Students and parents are the same
- Provides Board members across the state with opportunities to network while continuing to provide the historical prospective of FSBA/ the organization
- Training
- Ability to reach all Florida students
- Interpersonal relationships
- Inside track to legislation
- Leadership
- Training collaboration
- Unified goal
- One of a kind collaboration promoting education in Florida (future)
- State advocacy
- Consistent voice – “one voice” (future)
- Public education focus
- Professional deal
- 85 year history
- Open to all elected Board members, no litmus test to join
- Collaborate with others
- Synergy – focus on students
- Enhanced school book repository resources/process
- Only organization that primary focus is kids
- Only organization that has access to like/diverse ideas from 67 districts
- Florida top in education in Florida
- Have a PAC on national level
- Professional development geared for school board leadership
- Training specific to school board members on FL education issue
Andrea: The next “D” is Design.

Andrea: We have created the future in the Dream phase, and it is good. We are now going to come back to the present – 2015, and design how we will get to our 2020 Vision. The first tool in the Design Tool Box: Strategies/Metrics. Strategies are bridges to get you from here (2015) to 2020. They all need metrics so you know how to measure success. The second Tool in the Design Tool Box are Tactics/Metrics. Tactics are the planks in the bridge. They are smaller in scope than strategies, but they enable you to achieve strategies. They are small steps or action items. All tactics need to have a metric also, so you can measure successful completion.
Andrea: Take a look at the next polling slide and try to determine which of these strategies with metrics are. Sometimes it’s difficult to distinguish strategies from tactics, so let’s give it a try.

Andrea: 1 is a strategy and 2 is a tactic that helps to achieve number 1. Then 3 is a tactic to support the achievement of number 4, which is a strategy. You can see that Strategies are overarching/longer term tools and tactics are shorter action items that enable Strategies.

Andrea: Then we come to Champions, a third tool in the Design Tool Box. Many strategic plans fail because we don’t have Champions who own every part of the plan. Every Goal, Strategy and Tactic should have Champion’s names next to them, to ensure they are accomplished.

Andrea: Resources, the forth tool in the Design tool box, must be identified. Resources are needed to accomplish every Strategy and Tactic and these can be anything from people to time to money to materials to equipment, etc.

Andrea: A fifth tool in the Design Tool Box is a Timeline.
**Andrea:** All of these design tools put together, comprise a Strategic and Tactical Plan.

**Andrea:** This is a project plan, or a Gantt chart used to capture Strategies, Tactics, Metrics, Champions, Resources and Timeline.

**Andrea:** To be able to stay on course with the plan development and implementation, we need to always have the next golden nugget, which are: **Real-Time Meeting Notes**. They are key and ensure you capture what was discussed and agreed upon in your meetings. Project plans should be frequently referred to in meetings and updates on progress or plan changes should be captured in meeting notes.

**Andrea:** Then we go to the final “D,” **Destiny**. This is the implementation part of strategic planning and is by far the most difficult part. The first tool in the Destiny Tool Box is to **Communicate the Organization**.

**Roll Out.** The organization needs to all be informed and on the same page when rolling out the Strategic Plan!

**Andrea:** Tool number 2 in the Destiny Tool Box is **Accountability**. We need champions who take ownership of each part of the Strategic Plan, and who are held responsible for mobilization and successful implementation of the plan.
**Andrea:** A 6th Golden Nugget is **Communicate, Communicate, Communicate.** Communication is the life-blood of any organization, and the Strategic Plan becomes the roadmap for the organization. You can’t communicate the elements of the plan too much or too frequently!

**Andrea:** A 7th Golden Nugget: **Champions – who play to their Strengths.**

**Andrea:** How many of you have taken a strengths finder survey? You can find it at: [www.gallupstrengthscenter.com](http://www.gallupstrengthscenter.com)? I highly recommend you taking this short survey. The Gallup research has shown that only 2 out of 10 of us play to our strengths. When implementing a strategic plan, it is important to have Champions sign up for areas where their natural strengths can be leveraged.
Andrea: On the back of your worksheet you will find the four StrengthsFinder Themes. **StrengthsFinder Leadership Themes (www.gallupstrengthscenter.com)**

- **Executing**
  Team members who have a dominant strength in the Executing domain are those whom you turn to time and again to implement a solution. These are the people who will work tirelessly to get something done. People who are strong in the Executing domain have an ability to take an idea and transform it into reality within the organization they lead.

- **Influencing**
  People who are innately good at influencing are always selling the team's ideas inside and outside the organization. When you need someone to take charge, speak up, and make sure your group is heard, look to someone with the strength to influence.

- **Relationship Building**
  Relationship builders are the glue that holds a team together. Strengths associated with bringing people together -- whether it is by keeping distractions at bay or keeping the collective energy high -- transform a group of individuals into a team capable of carrying out complex projects and goals.

- **Strategic Thinking**
  Those who are able to keep people focused on "what they could" be are constantly pulling a team and its members into the future. They continually absorb and analyze information and help the team make better decisions.

Andrea: We want you to be among the 2 out of 10 who play to your strengths in the implementation of the FSBA Strategic Plan. When you sign up as a Champion for a specific area of the plan, we want to ensure it’s an area of strength for you, and one you’re passionate about! Let’s get a sense for the leadership strengths/styles in the room.
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My Primary Leadership Strength...

1. Executing 21%
2. Influencing 23%
3. Relationship Building 43%
4. Strategic Planning 13%

Andrea: Wow! We have a lot of Relationship Builders! We have representation of the other leadership strengths as well.

Andrea: A 3rd tool in the Destiny Tool Box: Progress Meetings. I encourage you to have frequent progress meetings scheduled as this ensures continued mobilization and accountability to implement the plan in the timeline established.

Andrea: A fourth tool in the Destiny Tool Box: Scorecards: Track Your Performance. How many of you have worked with balanced scorecards before? Scorecards show many performance indicators within the organization. The example slide shows one of the Performance Indicators for the FLDOE related to increasing percentage of students performing at grade level. You can see the current metric and the 2018 Goal/Metric, which becomes part of the FLDOE Balanced Scorecard.
Andrea: My recommendation to you is to have all performance indicators in one place, on one scorecard, that you are always tracking.

Andrea: An 8th Golden Nugget is: Accountability at all Levels. Remember the second Golden Nugget: Everyone has a Voice? The key to getting accountability at all levels is to ensure that everyone has a voice at the front end of the Strategic Planning Process and that everyone contributes to the plan! That way, when it’s time for Accountability, people at all levels of the organization will feel a part of the plan building, therefore they’ll want to be part of the plan implementation! Accountability at all levels comes easiest when you get everyone’s voice and buy-in on the front end.

Andrea: A 9th Golden Nugget is to: Measure and Recalibrate. Stay nimble. Since you will be tracking performance with the Scorecard, you’ll be aware of when something needs to be corrected or recalibrated. The 10th Golden Nugget is: The plan should Outlast the Initiators. If and when Initiators go, you don’t want the plan to fall down, you want it to continue. An example I can share is that a manufacturing plant created a Strategic Plan about 2 years ago. Recently, their CEO was promoted to another position and they brought in a new CEO. Because the plan was so integral to the organizations’ success, and the new CEO saw that there was plant-wide ownership of the implementation of the plan, the CEO chose to continue the course.
Andrea: A 5th tool in the Destiny Tool Box is to **Celebrate Short-Term Wins**. We need to pause and celebrate and leverage successes more. It can be done in a multitude of ways, from 5 minute meetings, to a pat on the back.

Andrea: This Strategic Planning Tool Box works!
Andrea: Let me share with you before we close the strategic planning process that is in store for FSBA (with your continued involvement) in 2015:

**FSBA Member Online Survey:** May 26 – June 4, 2015

An online survey was emailed to all FSBA Members, requesting recommendations for FSBA’s Ideal 2020 Strategic Direction and Visionary Goals. A Summary of survey results will be provided at the Annual Summer Conference.

**Annual Summer Conference General Session**

**Launching & Implementing a Highly Engaging, Results-Driven Strategic Planning Process for FSBA & Florida School Districts:** Thursday, June 11, 2015: 8:45 – 10:30am

Participants will be introduced to a comprehensive Strategic Planning Toolbox that will be used to create FSBA’s Ideal 2020 Strategic Vision & Direction.

During this highly interactive session, members will have opportunities to provide input on key elements of FSBA’s Strategic Planning Process.

All participants will learn how to stay engaged in the multi-phased Strategic Planning Process the FSBA will undertake in 2015.

**Annual Summer Conference Breakout Sessions**

**Into the Future with FSBA:** June 11, 2015, 10:45 – 11:45am; 1:15 – 2:15pm

Participants will brainstorm FSBA’s Ideal 2020 Future, including recommended Visionary Goals with Measurable Outcomes.

All FSBA Members are encouraged to attend one of these two sessions, as this is your opportunity to have input into the future goals and direction of your association.

The strategic priorities identified in each breakout session will be carried forward as recommendations in FSBA’s multi-phased strategic planning process in September, October and December, 2015!

**FSBA Board of Directors Leadership Development Meeting**

**Building the Strategic Direction & Priorities for FSBA’s 2020 Plan:** September 3, 2015

The Board of Directors will refine the FSBA’s Strategic Direction & Visionary Goals for the 2020 Plan, including recommended Measurable Outcomes and Champions.
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Strategic Planning Implementation Team Meeting
Finalizing FSBA’s 2020 Strategic Plan: October 16, 2015

The Strategic Planning Implementation Team will finalize the 2020 Strategic Plan, including the final Visionary Goals, Strategic Priorities and 1-Year Tactical Plan.

Annual Joint Conference
Adoption & Presentation of the 2020 Plan at the General Session: Dec. 1 – 3, 2015

The Board of Directors will be asked to adopt the 2020 Strategic Plan. There will be a Presentation/Roll-Out of FSBA’s 2020 Strategic Plan, including opportunities for Members to stay involved in the implementation of FSBA’s 2020 Strategic Plan. This is phase one, the member survey. In the breakout session you will have summaries of the survey. We just finished the annual conference and the breakout sessions. Phase two, they will look at what we do today and look at the goals and refine them. That will be in September and then we will have a planning implementation meeting. That’s where we finalize the plan and apply strategies, assign champions. Phase 3 is the annual joint conference. This is where the Board of Directors will adopt the plan. Then your job is to engage in implementation opportunities. This is part of the destiny phase. We need you all to help us implement the entire plan.

My level of excitement in the FSBA Strategic Planning Process

1. Cautiously Optimistic 33%
2. Pretty Excited 30%
3. More Excited about Strategic Planning than ever before! 37%

Andrea: Now that you know what’s in store, how excited are you?
Andrea: Ok, very good!

Andrea: Thank you and we look forward to seeing you all in one of the two breakout sessions where we will explore FSBA’s 2020 Vision and Goals!

Applause!

Addendum

Helpful Strategic Planning Definitions

- **Guiding Principles**: Any principles or precepts that guide an organization throughout its life in all circumstances, regardless of changes in its goals, strategies, type of work, or the top management.

- **Values**: Important and lasting beliefs or ideals shared by the members of a culture about what is good or bad and desirable or undesirable. Values serve as broad guidelines in all situations.

- **Vision**: An aspirational description of what we want to achieve in the Future.

- **Mission**: A written declaration of an organization’s core purpose and focus that normally remains unchanged over time.

- **Goal**: An observable and measurable end result achieved within a specific timeframe. A **S.M.A.R.T. Goal** is defined as one that is specific, measurable, achievable, results-focused, and time-based.

- **Value Proposition Statement**: A one to three sentence “elevator pitch” that summarizes (in lay terms) an organization’s offerings/differentiating features, target audience/benefits received and advantages over competitors.

- **Strategy**: A method or plan chosen to bring about a desired future, such as an achieving a goal.

- **Success Metric**: A number or quantity that records a directly observable value.

- **Tactic**: A detailed action by which a strategy is carried out.

- **Accountable Champions**: Persons willing to accept responsibility for the implementation of an action/plan.

- **Timeline**: A specified period of time in which an action will be started and completed.
Jonathan: We started this morning with some notes and sketches and listening to Ida talk about who inspires you. We took that to heart, that led to the concept of pulling back the curtain and putting students first to allow them to be inspired and be examples for them. You have this renaissance composition. Then around that you will see some of the highlights of your strategies. One of them was speaking with one voice, training, collaboration, communication, being #1, and being trailblazers, legislation, and making education a top priority.
Breakout Session One

Into the Future with FSBA

Annual Summer Conference Breakout Sessions
June 11, 2015, 10:45 – 11:45am; 1:15 – 2:15pm

Thank you for participating in this important breakout session, as this is your opportunity to have input into the future goals and direction of your association!

Imagine that it’s the end of 2020, and FSBA’s work in the development of school board leadership and advocacy for public education has had a greater impact on student achievement in our state than ever before!

Your task as a team is to prepare and present a **2020 Magazine Cover featuring FSBA’s unprecedented success and impact in Florida.**

Select a **keyboarder** who will capture your team’s brainstorming in the magazine software, as well as a **spokesperson** who will highlight your magazine cover headlines when we reconvene as a full group.

Use the scratch pad on the left to brainstorm overarching 2020 Headlines. Reach consensus as a team on your top **2020 Overarching Visionary Headline for FSBA** and copy and paste it in the main headline area.

Next, brainstorm **2020 Visionary Goals with Measurable Outcomes** - for each of the following 3 **Sub-Headline areas:**

- Increasing student achievement through the development of effective school board leadership
- Increasing student achievement through advocacy for public education
- Communication platforms and vehicles to serve FSBA Members

After 25 minutes, we’ll call time and ask each team to make a **60-second presentation** of their **2020 Magazine Cover**.

A Real-Time Record of both Breakout Sessions will be made available through the FSBA.

The strategic priorities identified in each breakout session will be carried forward as recommendations in FSBA’s 2015 multi-phased strategic planning process!
Jeanne Dozier, Lee County School Board: Let’s give Andrea a round of applause. Please remember to turn your cell phones off, we’d appreciate it. At the end of every row there is a roster. Please be sure to sign it. The press will call to see if you were in a session, I’ll take those up at the end. This is your opportunity to provide input directly. Feel free to put in all the input you’d like to share. This is the beginning of our strategic plan.

Andrea Henning, Executive Director, Collaborative Labs at St. Petersburg College: FSBA is my new favorite client. Today we are going to get visionary. Do you remember what “D” represents the future, the Vision we are going to launch? The Dream phase, yes! We will continue to leverage all of the strengths and discover and build FSBA’s Ideal 2020 future. A lot can happen between now and then. We are going to envision the goals for 2020. Here’s the process.

Appoint a keyboard savvy person to capture the ideas within your team and a spokesperson who can represent your work product. Then you will create the 2020 FSBA headline with 3 sub headlines. That is your workproduct.

This is the template, start on the left hand side. Begin with the end in mind, in 2020 you will make a major magazine cover and identify overarching headlines, then what will you be recognized for. Copy and paste the best one onto the cover. Then we have 3 sub headline areas:

1. Increasing student achievement through the development of effective school board leadership
2. Increasing student achievement through advocacy for public education
3. Communication platforms and vehicles to serve FSBA members

Come up with a bold goals. You can double click and change the name of the magazine and then add people, objects and terrain.

Let’s deploy into teams and let the visioning begin!
Andrea: Alright are you excited about the future of FSBA? PJ is going to be going through and saving those. Do we all have spokespersons from the teams? We are going to build from the 5 teams vision today. Jonathan is still at work. Team 1 I know that you have an apple. What’s the one thing that you could summarize in

Comment: Communication, seen as an expert, quality, success, achievement, partnership, validation, sort out what’s important.
CollaborativeLabs@spcollege.edu

Team 1 Spokesperson: We came up with Florida students leading in local rankings. FSBA created SB Leadership training that revitalized school board for more effective governance. Our measurable would be 100% of members would participate. FSBA fostered legislative partnerships ensured effective instruction at the local level. Our measurable would be that when we are advocating our initiative would be put into action in the legislative process. FSBA helped develop strategies through communication with parents and business. Our role in that, we couldn’t decide how often, but for FSBA to be the positive voice to get the message out to our parents and media. We said something positive on a monthly basis.

Andrea: What do you like about Team 1’s magazine cover?

Comment: Revitalizing schoolboards, apple and the world and 100% participants.
Team 3 Spokesperson: Florida Tops the Nation for Student Achievement – thanks to FSBA. That gives us an opportunity to say we were part of the effort. All 67 school boards receive Master Board Status. They learn to work as a group with a metric. Stakeholders surveyed, FSBA was identified as the go-to organization for public education. Too often we know what’s going on but we are the ones that are overlooked. Stakeholders all speak with one voice to achieve their top 3 legislative priorities for the year. We didn’t want it to be all about legislation but we didn’t know any other way to measure it. We want all stakeholders speaking with one voice.

Andrea: What do you like about that?

Comment: Go to org, one voice, stakeholders.
Team 5 Spokesperson: We actually went off of Time magazine, and picked Wall Street Journal because education is the number one economic driver. We want to have Florida shocks leading the pack. We feel we will be better if we stay focused. FSBA offers Board Members current innovative executive training. So many of us have been through master board, some of the PowerPoint and training is old school, we need to be the executives that we know we are. Local control for school boards, testing, funding flexibility and curriculum design. We know so much about local control and it has been taken away from us and we are left to implement it. We need to take the control back. It would be lovely to have that again. One proactive voice that is the voice we have to have. We need to get out of the weeds, let’s get all of the voices together for the most important cause, our children.

Andrea: What jumps out of you?

Comment: Local control, proactive voice.
**Team 7 Spokesperson:** We went with Florida Trend magazine, FSBA is Florida centric. We need to be acknowledged. EDC: 10 new Fortune 500 companies relocate to FL due to high achieving school districts. That's one of the reason businesses and people relocate to FL. Florida Trend: Legislators seek guidance from FL school board members as they craft education policy. One of the problems we've had historically is the decision makers don't consult educators when making decisions. National recognition for FL’s high quality public schools quality counts, council of great city schools. We know we have the high quality schools in the state of Florida, recognition for that will be an economic driver.

**Andrea:** What is the most exciting?

**Comment:** Legislators seek guidance.
**Team 9 Spokesperson:** FSBA passes the test! Florida public schools are the choice for parents. That’s our goal, we become the choice for parents. 67 local school boards masterboard trained, we felt if all of us are trained we can move forward cohesively. Record local education dollars paying big dividends, FL governor touts school board excellence in economic development. This is about making sure legislatures understand we drive economic development. School boards and community partner for success. With those partnerships, it drives economic development and that drives our public schools being the choice.

**Comment:** The choice.

**Comment:** We’ve thought about training but it’s not funded.
Andrea: We’ve seen the future and it is good. In the next session, we will be doing this with hopefully 10 teams. We are calling out all of the themes from these magazine headlines. We’ll also have all the sub headlines in one list. We will continue to build to these and that will be the work that the leadership board of directors will look at in September. It’s been a pleasure to work with all of you and may the force be with you.

Thank you all for being here. Talk it up, let’s have standing room only.

**Summary of 2020 Visionary Headlines & Goals for Breakout 1**

1. **FSBA 2020 Visionary Headlines**
   1. FLORIDA STUDENTS LEADING IN GLOBAL RANKINGS
   2. Florida Tops the Nation for Student Achievement - thanks to FSBA
   3. FSBA PASSES THE TEST! Florida Public Schools are the CHOICE for Parents!
   4. Florida Schools Leading the Pack
   5. Florida Public Schools Top Economic Driver for State of Florida

2. **Board Development: FSBA 2020 Visionary Goals**
   1. All 67 School Boards receive Master Board Status
   2. 67 Local School Boards Master board trained
   3. FSBA created SB Leadership training that revitalized school board for more effective governance
   4. FSBA Offers Board Members Current Innovative Executive Training
   5. EDC: 10 new Fortune 500 companies relocate to FL due to high achieving school districts

3. **Advocacy: FSBA 2020 Visionary Goals**
   1. Stakeholders surveyed FSBA was identified as the Go-To Organization for Public Education
   2. Record Local Ed $ Paying Big Dividends Fl Gov touts School Bd excellence in Econ Dev
   3. FSBA Fostered legislative partnerships ensured effective instruction at the local level
   4. Local control for school boards! Testing, funding flexibility and curriculum design
   5. FL Trend: Legislators seek guidance from FL school board members as they craft education policy

4. **Communication: FSBA 2020 Visionary Goals**
   1. Public Education Stakeholders All Speak with One Voice to achieve their Top 3 Legislative Priorities for the Year
   2. School Bds & Community Partner for Success
   3. FSBA helped develop strategies through communication with parents and business
   4. One Proactive Voice for One Important Cause - Our Children.
   5. National recognition for FL’s high quality public schools Quality Counts, Council of Great City Schools
**Breakout Session Two**

**Jeanne Dozier, Lee County School Board:** It is my distinct pleasure to be here and moderating this afternoon. We are starting on time. Please silence your cell phones. I need to introduce Andrea Henning and her staff. We all got up close and personal with her this morning. She is going to be as dynamic in this session. Let’s all welcome her and she can introduce her team.

**Andrea Henning, Executive Director, and Collaborative Labs at St. Petersburg College:** Are these the visionaries in the house? This is our task for the next hour to envision the ideal 2020 Vision and Goals for FSBA. First we are going to divide and conquer into teams. Take number as they are coming around. We have 4 or 5 teams, appoint a keyboard savvy person and capture the great ideas coming from your team and a spokespersons. This is our mission. We are building a magazine cover for FSBA for 2020. Has FSBA ever been on the cover of a magazine?

When you get to your team area, once you land on a great compelling headline, copy and paste it into the headline area. We have pre-populated the sub headlines in the magazine areas. We want you to come up with 2020 Goals for FSBA:

1. Increasing student achievement through the development of effective school board leadership
2. Increasing student achievement through advocacy for public education
3. Communication platforms and vehicles to serve FSBA members

You can also select a magazine name. Add pictures, people, and terrain. Questions?
Team 1 Spokesperson: We had the best computer guy doing ours. We thought about a whole bunch of different things. FSBA, leading Florida’s education, graduation rates soar. We’re number 1. That’s why the ribbons there. All 67 counties master board trained, that’s the midget professionals. Progressive legislative platform making education the top priority, that’s the apple and the capital. Utilizing technology to reach all stakeholders, computer and the globe being held up.

Andrea: What leaps off the page?

Comment: #1.
Team 3 Magazine Cover

TIME

T3: Florida Students Lead the Nation!

District Boards Team Up to Boost Student Achievement - Highest SAT & ACT Scores in the U.S.
FSBA Drives State Education Policy - School Boards’ Platform Adopted by Legislature
Confidence in public education at record levels - Neighborhood schools enrollment grows

Team 3 Spokesperson: Florida students lead the nation, we debated about Florida School Boards and we decided students is what we are all about. District boards team up to boost student achievement, highest SAT and ACT scores in the US. FSBA drives state education policy, school boards’ platform adopted by legislature. Our metric was that we would encourage the legislation. Confidence in public education at record levels, neighborhood schools enrollment grows, enrollment in other initiatives might decrease.

Andrea: What did you like about this magazine cover?

Comment: Florida students lead the nation, #1.
Team 5 Spokesperson: FSBA recognized as the voice of innovative education in Florida, trying to position this organization as a true recognized leader. FSBA supports and enhances school board members with collaborative experiences. We did elaborate this is with a keen focus on students. Channeling resources to strengthen public education for the benefit of each child. We are developing and shaping policy. Engages local school board members in state and national education conversation, it needs to serve as the conduit to bring all school boards to the conversation.

Andrea: What calls to you here?

Comment: Innovate, FSBA is the voice of education in Florida, students.
Team 7 Spokesperson: FSBA initiatives lead Florida public schools to #1 ranking. Board development, training, leadership. FSBA led education reforms putting students first, closing achievement gap and historic funding levels. Communication built partnerships with business leaders, parents.

Andrea: What do you like about this?

Comment: The globe, putting students first, #1, training, reforms.
Andrea: Let’s look at all of the categories. Let’s look at the areas of alignment in the headlines.

Comment: FSBA leading, #1 ranking.

Andrea: Do you see any here?

Comment: Training, working together, team, expectation, current.

Andrea: How about in advocacy goals?

Comment: Flexibility funding, influencing the legislature, partnerships, united drive.

Andrea: In the area of communication?

Comment: Collaboration, connections, one voice, communities.

Comment: How do the ideas compare from the earlier breakout?

Andrea: They are very similar.

Andrea: All of these ideas will be in the Real-Time record. Good stuff.
Summary of 2020 Visionary Headlines & Goals for Breakout 2

1. FSBA 2020 Visionary Headlines
   1. FSBA...Leading Florida's Education - Graduation Rates Soar!!!
   2. Florida Students Lead the Nation!
   3. FSBA Recognized as the Voice of Innovative Education in Florida
   4. FSBA Initiatives Lead Florida Public Schools to #1 Ranking

2. Board Development: FSBA 2020 Visionary Goals
   1. Board Development - All 67 Counties Master Board Trained
   2. District Boards Team Up to Boost Student Achievement - Highest SAT & ACT Scores in the U.S.
   3. FSBA supports and enhances school board members with collaborative experiences.
   4. Board Development, Training, Leadership

3. Advocacy: FSBA 2020 Visionary Goals
   1. Advocacy - Progressive Legislative Platform making Education the top priority.
   2. FSBA Drives State Education Policy - School Boards' Platform Adopted by Legislature
   3. Channeling resources to strengthen Public Education for the benefit of each child.
   4. FSBA led education reforms putting students first, closing achievement gap and historic funding levels

4. Communication: FSBA 2020 Visionary Goals
   1. Communication - Utilizing technology to reach all stakeholders
   2. Confidence in public education at record levels - Neighborhood schools enrollment grows
   3. Engages local school board members in state and national education conversation.
   4. Communication: Built Partnerships with business leaders, parents
Jonathan: We started this morning with some notes and sketches and listening to Ida talk about who inspires you. We took that to heart, that led to the concept of pulling back the curtain and putting students first to allow them to be inspired and be examples for them. You have this renaissance composition. Then around that you will see some of the highlights of your strategies. One of them was speaking with one voice, training, collaboration, communication, being #1, and being trailblazers, legislation, and making education a top priority.

Andrea: We will have a high res image of this in the Real-time Record. May the force be with you.

Jeanne Dozier, Lee County School Board: I want to thank all of you for being here and for your input. Please feel free to sign up to participate. It’s important we have your input. Be sure you are a part of it. Thank you again, God speed.