

History of OSBA's long-range planning process

The first long-range plan was developed in 1981 and implemented the following year. Its purpose was to provide programs and services required by boards of education to meet the educational needs of public school students for the next five years and beyond. The plan recognized that the mission and goals of the association would remain fairly constant, with the annual operational objectives being flexible and changing to reflect OSBA's changing priorities and needs. The goals and operating objectives were developed and implemented on a divisional basis within OSBA.

The next major long-range plan was approved in 1989 by the Board of Trustees. The planning process was revamped: the trustees' objective was to develop a plan that would emphasize association-wide goals, instead of the division goals that were a part of the first long-range plan. The process included a review by the National School Boards Association (NSBA) of OSBA's programs, services, policies and procedures. Under this long-range plan, the association's mission was created, goals were developed and strategies to reach those goals were written. Development of the new long-range plan was more of an organization-wide effort than the previous plan.

In 1994, the Board of Trustees determined that it was time to review the long-range planning process once again. A Long-Range Plan Task Force (LRPTF) was appointed and its plan, *Blueprint 2000*, was approved by the Board of Trustees in 1996. The plan contained seven new goals and suggested strategies to attain those goals. *Blueprint 2000* assigned responsibility for implementation of the plan to action teams, which were asked to create specific action plans to be implemented over the next three years. The action teams included OSBA staff (cross-divisional) and school board members.

As part of the planning process for *Blueprint 2000*, it was suggested that a LRPTF convene every three years to take a fresh look at the long-range plan. In keeping with this three-year cycle, the OSBA Executive Committee took action in 1999 to authorize the OSBA president to appoint a new LRPTF. The committee's action directed the LRPTF to:

- Review the results of the existing plan and process.
- Assess the current and future needs of the association and its members.
- Develop an implementation process that concentrates on continuous improvement of OSBA programs and services, rather than strict adherence to the "strategic planning" model.
- Devise a mechanism to keep the Board of Trustees informed about the planning and improvement process.

The LRPTF drafted a continuous improvement plan that was approved by the Board of Trustees in May 2000. This continuous improvement plan was based on a cycle of planning, improving, assessing and refining strategies to move the

association up the spectrum of excellence. The association's beliefs, mission and goals were the foundation for this cycle. Strategies included creating new courses of action, redesigning courses of action that weren't yet achieving desired results, channeling resources and support into courses of action that showed potential, and eliminating or reducing support for courses of action with limited value, or as a result of changes in members' needs or the operating environment.

Although the intention of the continuous improvement model was for the plan to continue in perpetuity, it suffered from lack of support from top management. Action plans were developed and updates given to the Board of Trustees until the end of 2002. Several excellent initiatives resulted from the plan, but the planning process did not meet the goal of being the continuous cycle that had been intended.

In November 2006, the Executive Committee directed the executive director to review OSBA's strategic/long-range plan. Since trustee involvement and commitment is essential to a plan, strategic planning was discussed at the January 2007 governance meetings. At that time, the Executive Committee took action to proceed with reviewing the plan in accordance with the following steps:

- Address the OSBA mission statement.
- Review the current plan and process.
- Assess the current and future needs of the association.
- Devise a mechanism to keep the Board of Trustees informed about the planning and improvement process.
- Include results of the 2007 NSBA Operations Audit in discussions.

In early 2007, President Martha F. Rothey appointed a strategic planning team to proceed with this process. The team consists of 10 school board members and 10 staff members. Sue Waechter of Cornerstone Consulting Associates LLC was selected to serve as facilitator of the group.

Objectives from the 1982 long-range plan

1. Develop a comprehensive OSBA policy manual
2. Evaluate the need for special caucuses of school board members
3. Update job descriptions for all OSBA staff positions
4. Provide the news media with a “who-to-call” list for better access to accurate information
5. Provide additional seminars on topics such as board-superintendent relations and curriculum development
6. Evaluate a pilot program for superintendent searches and explore the feasibility of developing a treasurer search program
7. Establish a plan to encourage school board members and others to join Citizens United for Responsible Education (CURE), the political action committee
8. Develop seminars and publications to aid school districts in financial forecasting
9. Expand labor relations services
10. Propose a plan of action to identify and initiate legislation important to educational management
11. Formulate a plan to review education funding from local, state, federal and other sources, including recommendations for legislative action
12. Conduct a feasibility study to determine if OSBA should develop an independent computer capability
13. Create an electronic database to coordinate all facets of OSBA operations.

Goals from the *Blueprint for the 1990s*

1. Improve training programs for board members and administrators
2. Establish OSBA as a statewide leader on school management issues
3. Increase awareness of the association’s role among members and encourage them to rely on OSBA for assistance, unity and support
4. Enhance efforts to achieve legislative goals, protect management rights and preserve local control of school systems
5. Provide every member with a basic, dues-based program of services, as well as fee-based services on an as-needed basis
6. Work to improve public education structure and funding
7. Meet members’ needs with an effective organizational structure, highly competent staff and sound business practices
8. Develop effective research and data-gathering capabilities in order to better inform and advise members on critical education issues.