Conducting a Strategic Review

How your advisory board can help you see the big picture

Building a successful program is hard work: it takes vision, effort, and a sustained commitment to get it up and running. And once it's in motion, producing the results you had hoped for, it's easy to go on autopilot, slipping back to maintenance mode while you look for other fires to put out.

But if you've got a successful campaign, autopilot may be the riskiest path you can take. Programs have lots of moving parts, and over time, circumstances can change, resulting in your initiative slowly—or suddenly—becoming less effective or even unnecessary. For that reason, it makes sense for you and your advisory board to conduct regular strategic reviews of your programs.

Strategic reviews are different from your regular review of program stats and day-to-day operations. Data tracking systems are like the indicators on the dashboard of your car: they'll tell you how fast you're going and whether you're running low on gas or oil. But they won't tell you what's happening outside the car: they won't tell you whether it's snowing, or whether a bridge is out on the road ahead.

In order to make sure your program responds to the current state of the market – i.e., those external conditions outside the scope of your evaluation "dashboard" – you need to institute a period strategic review of your efforts.

In the context of Career Technical Education, a strategic review should be done on a program by program basis, but it should also be done periodically on a broader school-wide or district basis, assessing the match of programs offered to the needs of the regional economy.

Planning the Strategic Review

A strategic review is an opportunity to step back and review the work you've done to date, the market landscape, and whether you need a course correction in order to continue providing value to your constituents. For many people, this is an annual exercise. When possible, it should be conducted off-site, reducing distractions and supporting your efforts to get a fresh perspective.

It's best to start planning for your strategic review several weeks prior to any sort of actual retreat: many of the questions you'll need to answer will require some research before you begin brainstorming on next steps. Be sure board members and other invited guests have supporting documents well in advance so they have time to prepare.

Elements of the Strategic Review

Some of the big-picture items you should incorporate into your strategic review include:

Logic Model

A logic model, or theory of change (or theory of action), simply outlines how your program is intended to work and how it is intended to foster change. When you launched your initiative, it was based on a logic model: you had a group of students that you wanted to move from point A to point B along some axis, and your intervention caused that change. It's time to take a fresh look at all of those elements.

- You designed your program to serve a specific population - is your target population still the correct one?

- If your intervention is designed to move them from one point to another, are they still at point A?

- Do they still need to get to point B?

- Is the axis of change still the correct one? The thing that you're working to improve, whether graduation rates, test scores, or something else – is it still relevant and important?

- Is your intervention still the right agent of change to reach your goals effectively and efficiently?

Competition

No program operates in a vacuum: there are often alternate opportunities available to your chosen audiences. When considering the services you offer to your target audience, are there any new organizations operating in your market, or have existing organizations expanded their service area or capabilities to become new (or better) competitors?

In education, we don't like to think of other school systems or community colleges as "competitors," but in this context there are limited resources for which different entities are competing. If a community college is already running a successful career-themed program, it may not make sense to enter that space as a direct competitor, but perhaps enter as a feeder system to the college program. With another school system that is already offering a program of interest, consider if there is enough funding, employment opportunities for program graduates and business partners to support another program. If not, consider opting out of the program opportunity or look for a way to collaborate with the neighboring school district.

Asset mix

As sponsors, supporters, and funding sources come and go, the mix of assets available to fuel your efforts will inevitably change. What does this mean to your way of doing business?

Feedback

Assuming you've been collecting feedback from program participants and supporters, what are they telling you about your program? This type of feedback, from people who have a vested interest in your work, is valuable and should be given due consideration.

Staffing

The strategic review is the perfect time to consider staffing issues, both in terms of full-time and volunteer positions. Depending on what you want to achieve during the next operational cycle, you may need to increase staff across the board, grow in certain areas, make cuts, or shift people to areas that need attention.

Operations

It should be standard procedure to review business operations on a regular (often annual) basis, and it is particularly helpful to have data on your performance in previous years to use in benchmarking your current efforts. Two areas in particular to consider: make sure that your administrative budget isn't growing out of proportion to other areas of your operation, and look to see whether you're maintaining or increasing the return you see on your investment in development activities.

By stepping back to review all of the elements of your proven programs, both internal and external, you'll not only ensure that your campaign remains relevant and vibrant, you'll be uncovering opportunities to build on existing success - a far easier prospect than creating new programs from scratch.

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