

[School Name] Strategic Growth Plan 2019

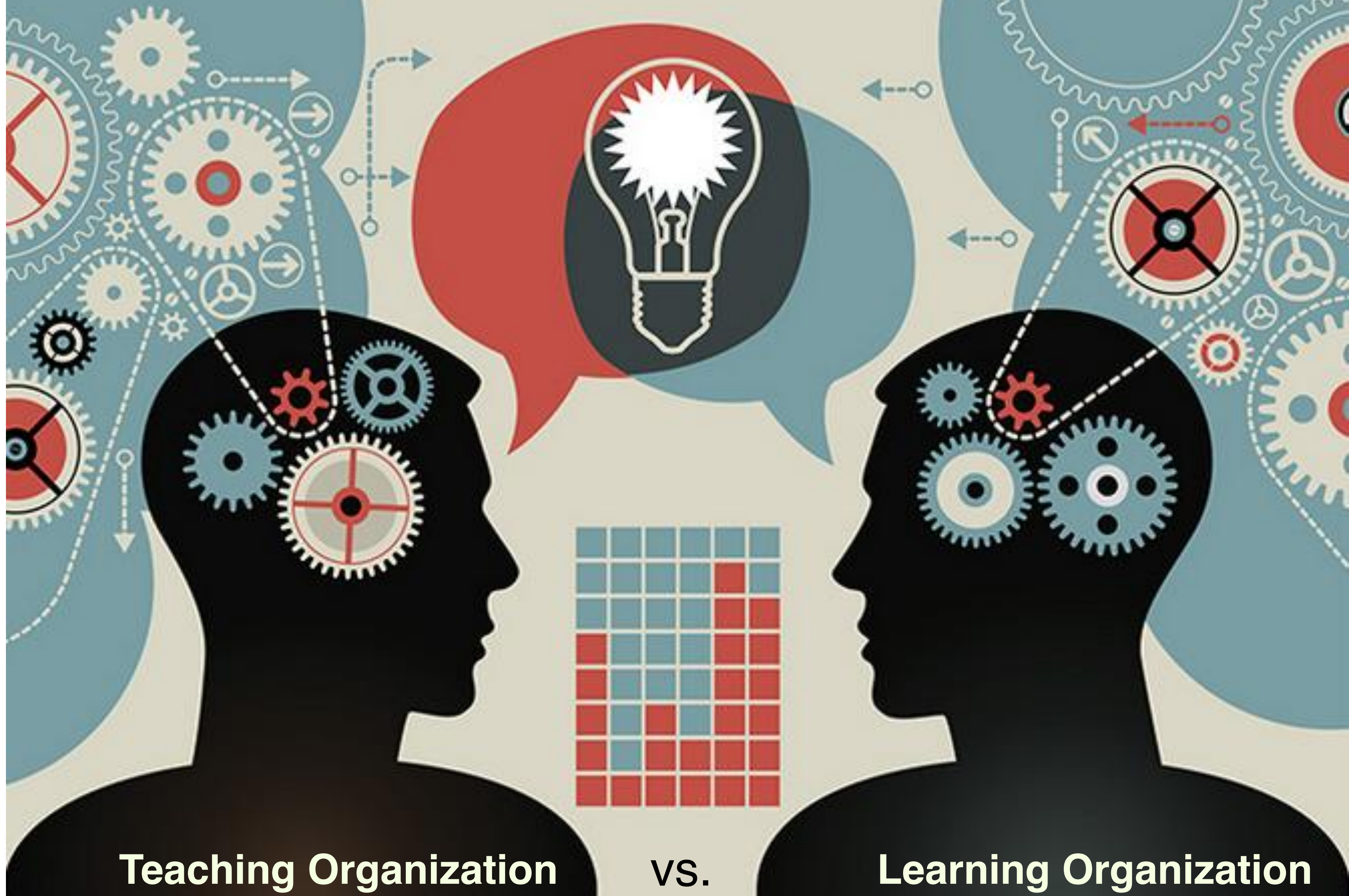
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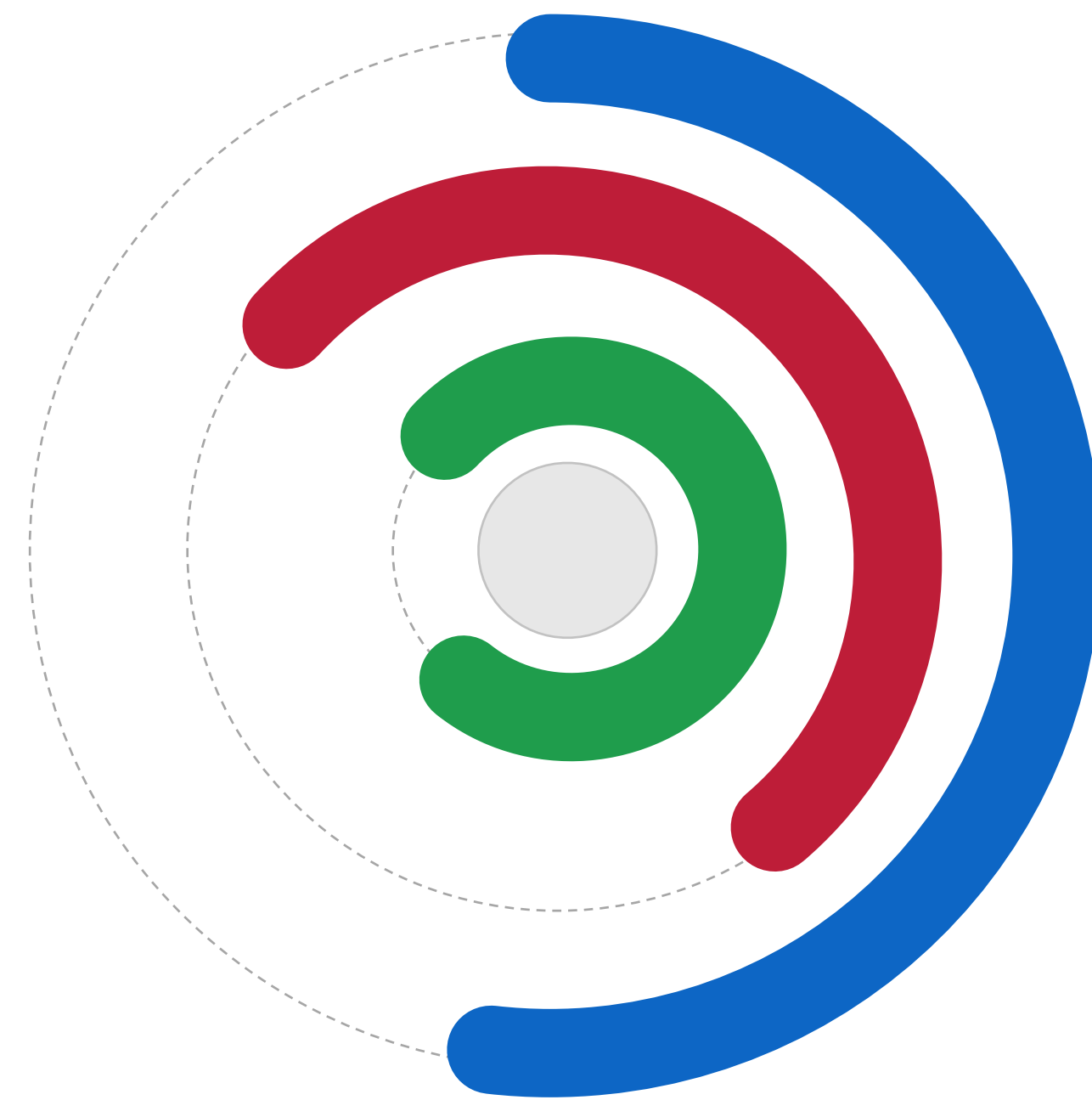
Motivating Belief



Talented,
Energized,
Engaged Educators
Change the World



The School Growth Engine



Leadership Capacity

Talent, Energy & Engagement

Organizational Health

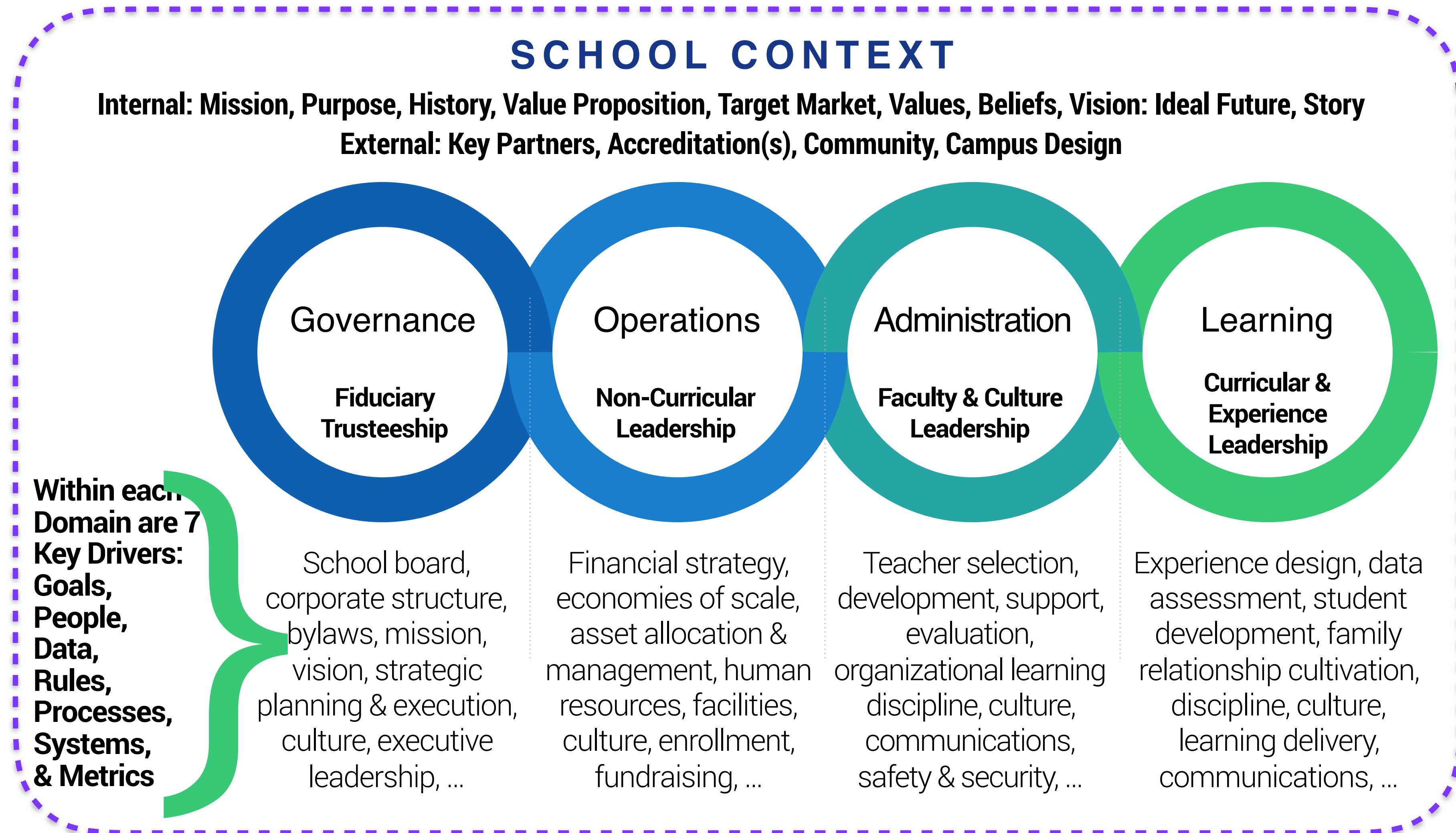
Cohesiveness, Clarity,
Communication & Consistency

Continuous Improvement

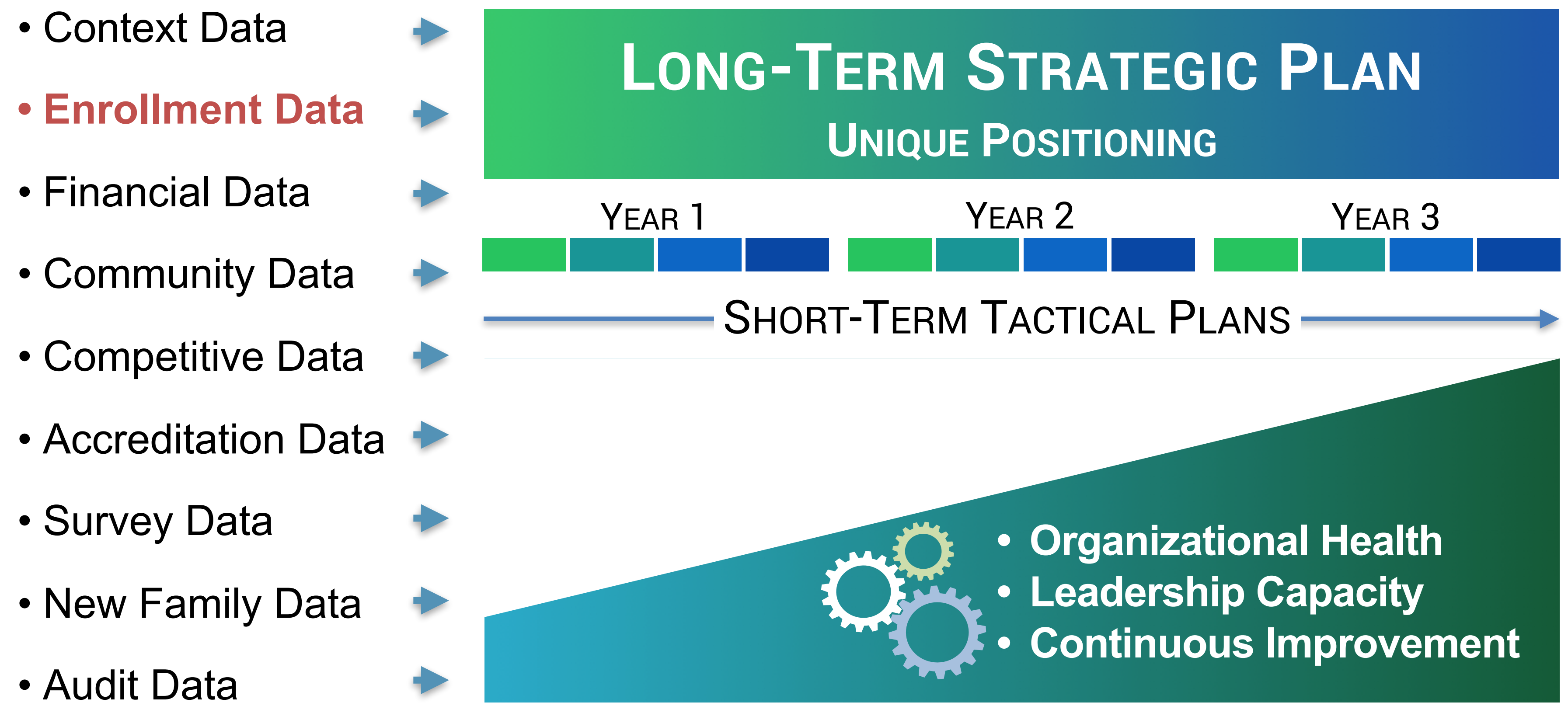
Systems Thinking, Personal
Mastery, Mental Models, Shared
Vision & Team Learning

School Growth Design Framework™

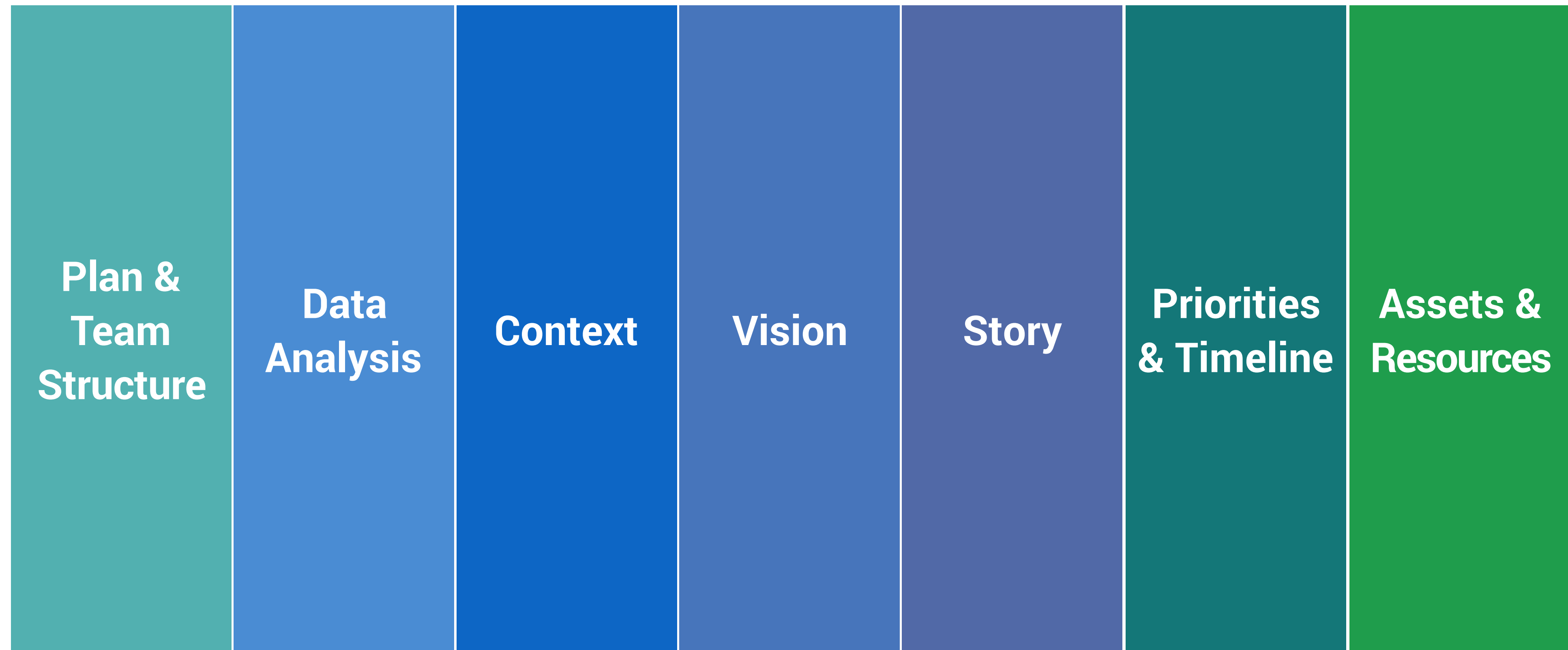
Schools are complex organizations with inter-dependencies across the Four Domains of School Design. Understanding how each component and decision is connected enables greater clarity, accountability, and growth.



Growth Plan vs. Strategic Plan



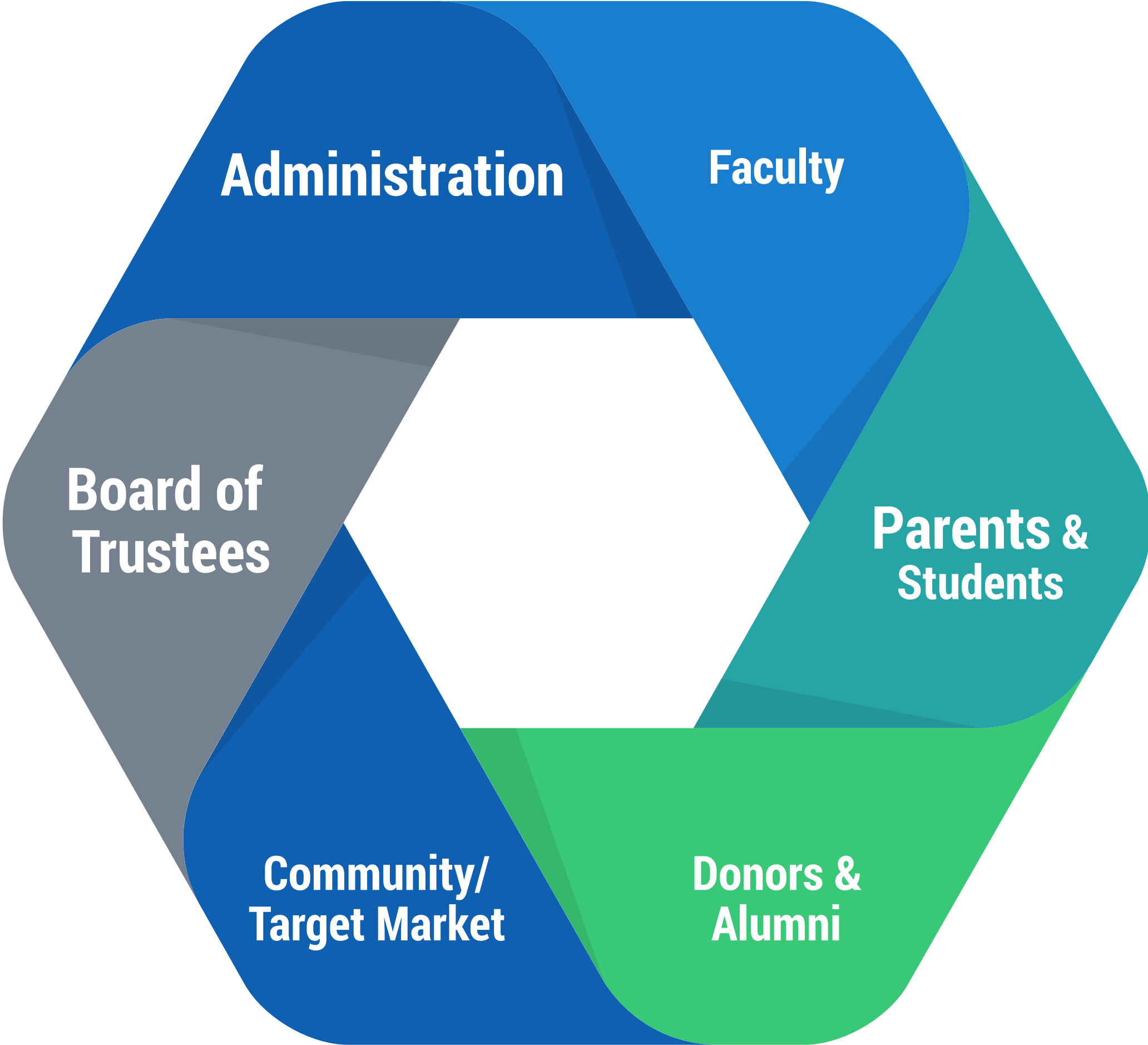
7 Stages to Create a Strategic Growth Plan



Stage 1

PLAN & TEAM STRUCTURE

Strategic Growth Plan Leadership



STRATEGIC GROWTH PLAN LEADERSHIP	
BOARD of TRUSTEES	
ADMINISTRATION	
FACULTY	
PARENTS	
STUDENTS	
DONORS & ALUMNI	
COMMUNITY/TARGET MARKET	

Guiding Principles

We Believe this strategic growth plan ...



We will measure the success of this plan by ...

Strategic Growth Plan Non-Non-Negotiable

Strategic Growth Plan Rules



Milestones



Milestone	Due Date	Notes
Plan & Team Structure		
Data Collection		
Data Analysis		
Vision		
Story		
Priorities		
Financial Plan		
Implementation Schedule		
Strategic Plan Introduction		

Stage 2

DATA COLLECTION & ANALYSIS

Data Sources

<input type="checkbox"/> Enrollment Data	Historical Enrollment, Funnel Progression
<input type="checkbox"/> Financial Data	Financial Indicators, Financial Aid, Financial Audit
<input type="checkbox"/> Competitive Data	Features, Value Props, Story Points
<input type="checkbox"/> Accreditation Data	Commendations, Recommendations, Other Feedback
<input type="checkbox"/> Survey & Focus Group Data	SG Faculty Survey; SAIS NPS Survey of Faculty, Families, and Alumni; New Families; Phone Survey of Non-Reenrolled and Community
<input type="checkbox"/> Audit Data	Talent Audit, Enrollment Audit
<input type="checkbox"/> Other Sources	Previous Market and Competitive Research

Data Collection Schedule

Data Collection Method	Month	Notes
Enrollment Data		
Faculty Pre-Planning Survey		
SAIS School Culture NPS Survey		
Accreditation Data		
Focus Groups		
Phone Surveys		
Finance Data		
Competitive Data		
Data Analysis		

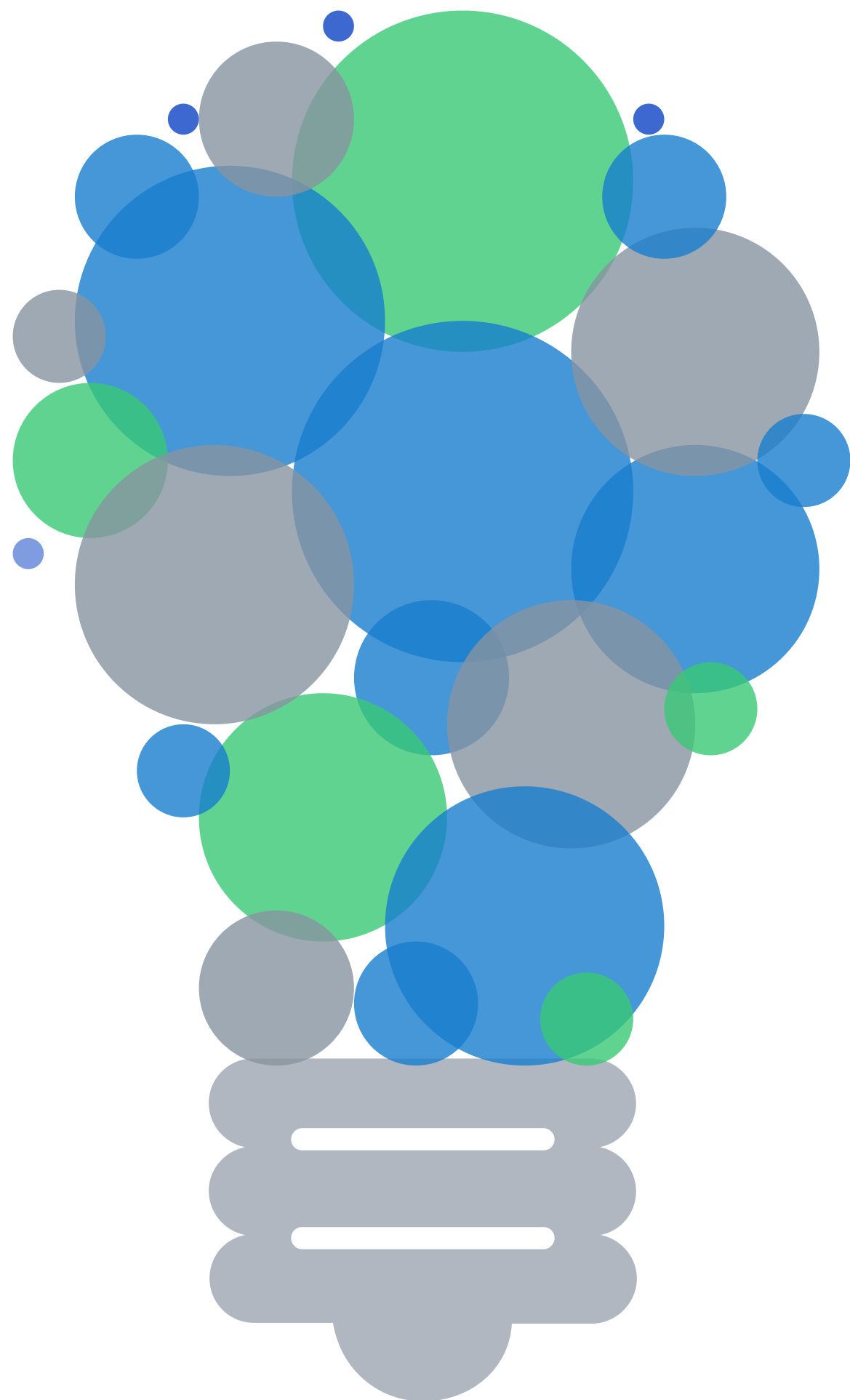
Focus Groups

Focus Group	Date	Facilitator(s)
Faculty		
Parents		
Students		
Alumni		
Dis-enrolled Families		
Other Constituents		

Focus Groups Notes

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Culture & Climate Survey Results



Enrollment Data



HISTORICAL ENROLLMENT: PK – 12th

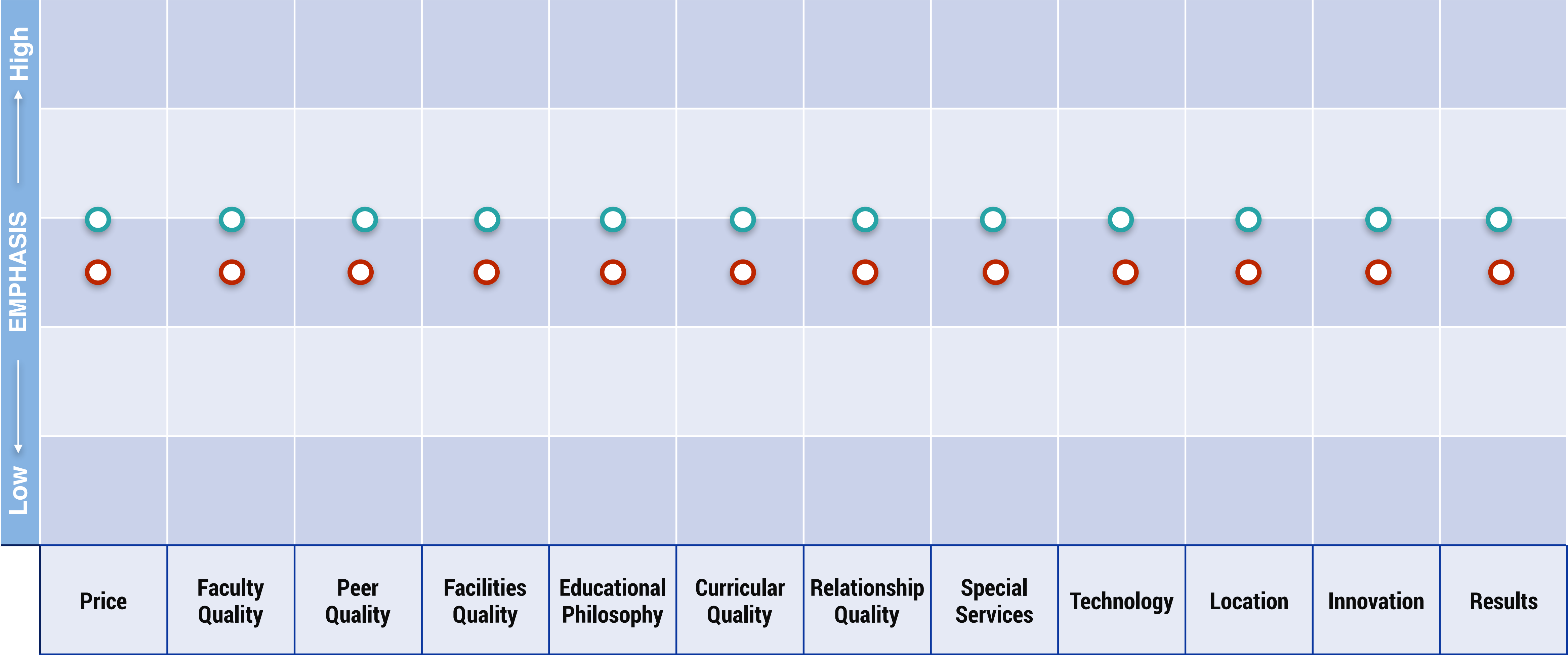
Historical	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019
PK 3											
PK 4											
K											
1											
2											
3											
4											
LOWER											
5											
6											
7											
8											
MIDDLE											
9											
10											
11											
12											
UPPER											
TOTAL:											

Financial Data



Competitive Strategy Canvas

○ = Desired Position
○ = Position based on Data Analysis



Analysis: Disciplines of Effective School Leadership

Discipline	Rating	Comments
Talent		
Energy		
Engagement		
Cohesiveness		
Clarity		
Communication		
Consistency		

Analysis: Disciplines of Effective School Leadership

Talent	Rating	Comments
Systems Thinking		
Personal Mastery		
Mental Models		
Shared Vision		
Team Learning		

Key Questions

Stage 3

CONTEXT

Context: Purpose



Context: Mission



Context: Core Values

Context: Historical Timeline

Year	Major Milestones/Leadership Changes

Context: Target Market

Income	
Values	
Education	
Location	
Priorities	
Capacities	
Connections	

Context: Key Assets

Asset	Description

Context: Key Partners

Partner	What do they need/want?

Stage 4

VISION

THE MISSION VS THE VISION

The **mission statement** defines what the school seeks to accomplish to fulfill its purpose. The mission statement focuses on today and what the organization does. It's not a strategic objective, but rather the basis on which strategic objectives and the entire strategic plan are developed.

While schools often use mission and vision statements interchangeably, it's beneficial to have both because having purpose and meaning are critical for success.

The **vision statement** describes what the school will be like 3 years from today. It's an aspirational vision that speaks directly to every faculty member to inspire the actions needed.

Key questions addressed by the vision statement:

- Who will we become over the next three years?
- How will the school be/look different?
- What impact do we want to have on our community within this timeframe?
- In what ways will we engage with our faculty and families?
- What will the culture of our school look like and how will this impact our stakeholders?



Vision Statement

Stage 5

STORY

How to Create the School's Brand Story

<p>Know the Character</p>	<p>Description of Parent/Student we seek to serve, demonstrating empathic understanding of their goals, pains, beliefs, influences, and fears.</p>
<p>Define the Problem</p>	<p>Every story is about somebody who is trying to solve a problem, so when we identify their problem (genuine, not contrived), they recognize us as the school that understands them.</p>
<p>Become the Ally</p>	<p>Stop losing sleep over the success of the school and start losing sleep over the success of your families. As an ally with your families, how do you most effectively express an understanding of their pain and frustration. They don't know you care unless you tell them and show them with clear authority.</p>
<p>Give The Plan</p>	<p>Script the path, making it clear and simple to engage with you and achieve their goals. Remove feelings of risk (e.g., social, financial, educational) they may have of committing to an independent school.</p>
<p>Call(s) to Action</p>	<p>How do we challenge our parent/student to take action? People are naturally attracted to clarity and will seek to avoid confusion. How can we make the story we've invited these families into so enticing that they can't wait to take the next step in this exciting journey?</p>
<p>Identify the Risks</p>	<p>What are the risks of not partnering with this school to navigate the journey of education? "So what" if they choose public school or another school? People are strongly motivated by their innate aversion to lost opportunity.</p>
<p>Define Successful Results</p>	<p>What happens at the end of this journey with you? Give them a picture/vision to believe in and pursue.</p>

Create the School's Brand Story: Faculty

Character	
Problem	
Credible Ally	
Plan	
Call(s) to Action	
Risks	
Results	

Create the School's Brand Story: Families

Character	
Problem	
Credible Ally	
Plan	
Call(s) to Action	
Risks	
Results	

Stage 6

PRIORITIES

Setting Strategic Priorities

<p>Three Priorities</p>	<p>Setting priorities is hard! Because making these critical decisions involves risk, opportunity cost, uncertainty, and especially commitment. We’re going to gain from the power of focus by narrowing the potential goals down to three. Unless we create a future that is bigger than our past, our past is very likely to be repeated in the future.</p> <p>True decisions involve courage — because it takes courage to commit to something beyond our own current feelings. It takes courage to commit to a future filled with unknowns. So we’re going to set three “SMART” goals (Simple, Measurable, Achievable, Results-oriented, and Time-sensitive) based on the entirety of the data that is now available to us.</p>
<p>Potential Barriers</p>	<ul style="list-style-type: none"> • Leadership Team lacks passion for the goals that have been set • The goals are not precise • The goals are at cross-purposes with the Leadership’s personal image and goals
<p>Potential Goal Categories</p>	<ul style="list-style-type: none"> • Faculty Quality & Engagement • Financial Sustainability • Family Culture & Engagement • Operational Quality • Curricular Cohesiveness & Consistency • Co-Curricular Programming & Quality • Data & Systems • Educational Philosophy & Outcomes

Question for Setting Priorities

What are the major themes from the Data Analysis?	
What recommendations from our last accreditation do we want to include?	
Based on the Strategy Canvas, what is our base for competing and delivering value?	
What are we best at? What makes us unique?	

Question for Setting Priorities

What are the “big rocks” – strategic priorities – we need to reach our vision?

What must we accomplish over the next 1 to 3 years to achieve these?

What are we NOT going to do? What are we going to stop doing?

What strategic questions must we still address?

How will we measure our success? (Key Performance Indicators)

Three Strategic Priorities

	Description	Support
1		
2		
3		

Tactical Initiatives to Accomplish Priority #1

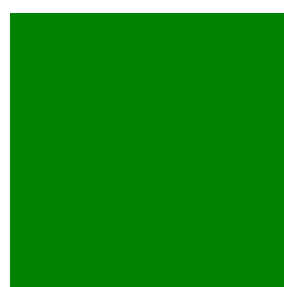
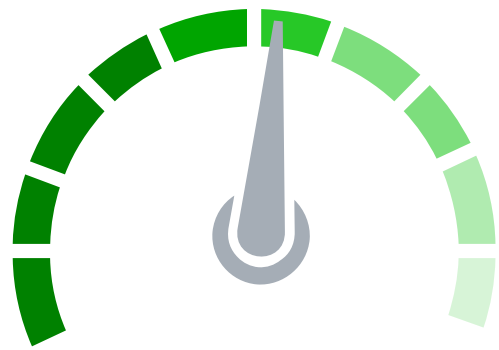
Tactical Initiatives to Accomplish Priority #2

Tactical Initiatives to Accomplish Priority #3

Potential Key Performance Indicators



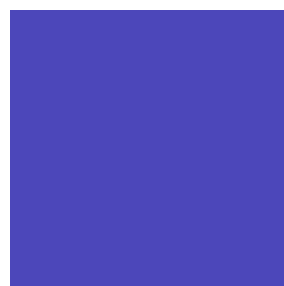
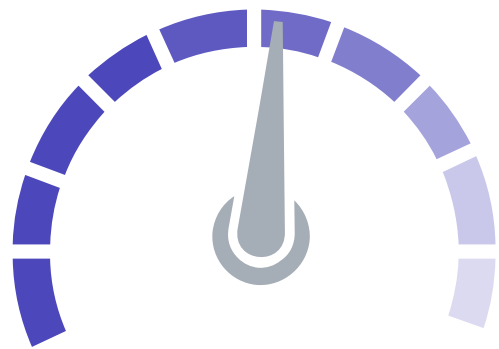
Re-Enrollment



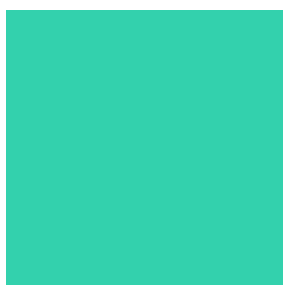
Family Engagement



Talent Quotient



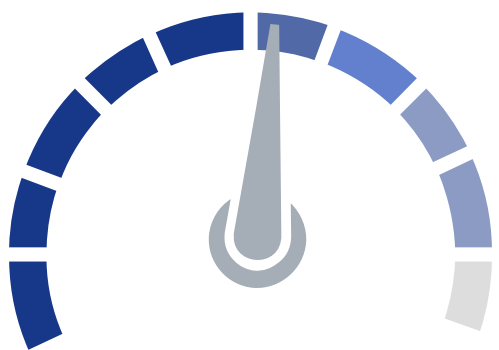
Response Time



Progressive Applicant Yield



Communication Flow



Net Revenue Per Student

Key Performance Indicators

Description	Frequency	Data Sources	Reporting

Stage 7

ASSETS & RESOURCES

Budget Plan for Each Priority

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Plan Journal

Plan Journal

Date:

Purpose:

