



How to Create a Strategic Growth Plan






WE **GROW** SCHOOLS AND THE PEOPLE
WHO HAVE THE COURAGE TO LEAD THEM



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Introduction to a Strategic Growth Plan



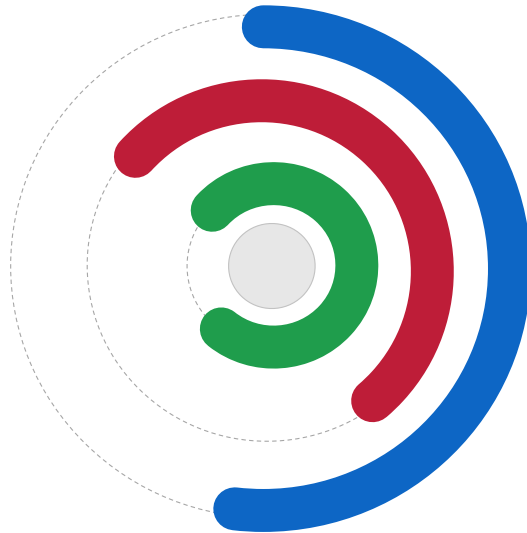
The Strategic Growth Plan process produces a unique combination of advantages:

- A plan that will maximize the specific organizational genius and valuable assets of each school.
- A plan that will provide a galvanizing long-term vision combined with short-term, breakthrough results that build confidence and momentum.
- A plan that incorporates best practices collected from schools around the globe and across all genres of education.
- A plan that produces a compelling brand narrative that will energize your base.
- A plan that advances the three core components of your growth engine: Leadership Capacity, Organizational Health, and Continuous Improvement.
- A plan that increases engagement with and among the school board, administration, faculty, families, funders, the church and the community.



The School Growth Engine

12 Disciplines of Effective School Leadership



Leadership Capacity

Talent, Energy & Engagement

Organizational Health

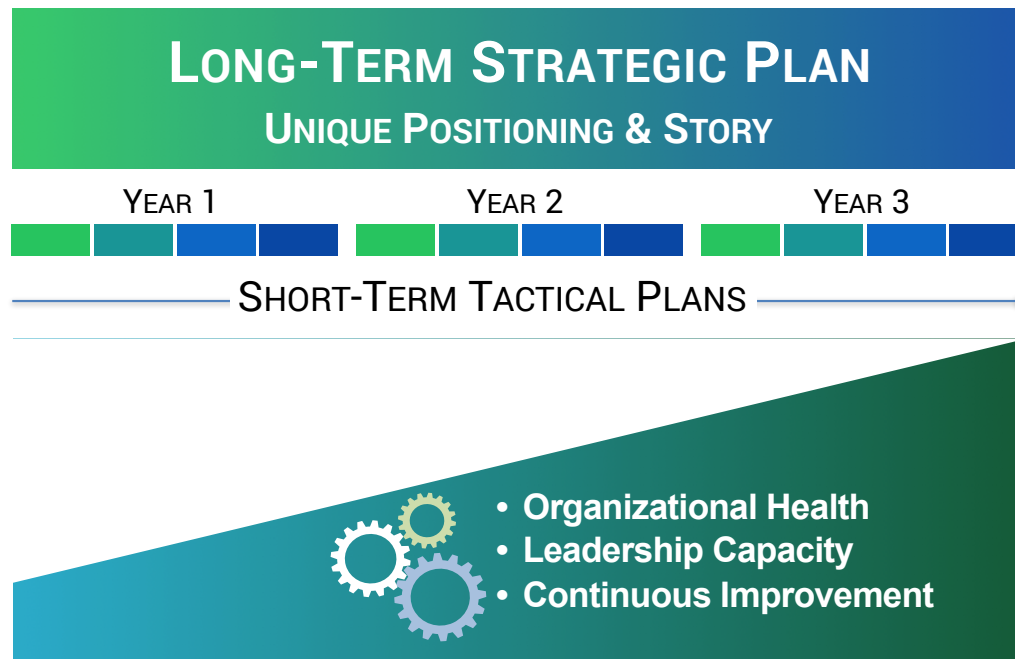
Cohesiveness, Clarity,
Communication & Consistency

Continuous Improvement

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

Strategic Growth Plan

- Context Data →
- **Enrollment Data** →
- Financial Data →
- Performance Data →
- Community Data →
- Competitive Data →
- Accreditation Data →
- Survey Data →
- Focus Group Data →
- Audit Data →

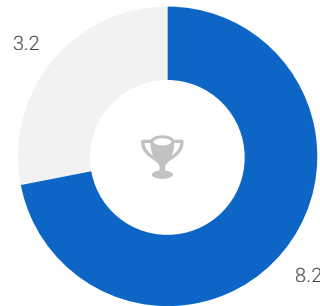


Strategy defines how to move the school from its present position to a desirable but less certain future position.

Key Performance Indicators



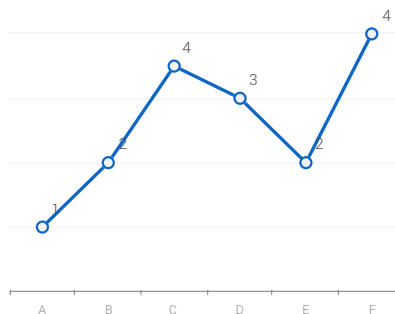
Financial Results



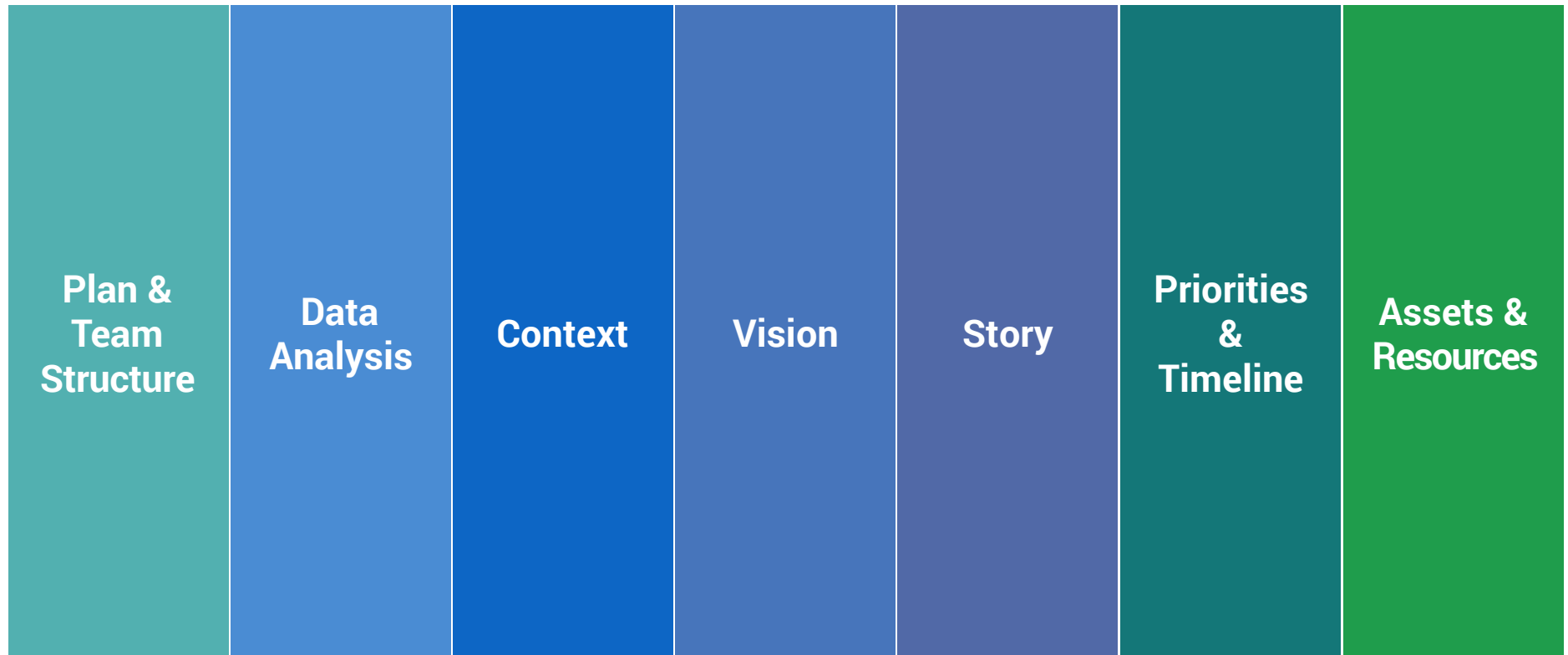
- Target market
- Value Proposition
- Relationship Types
- Key Activities
- Key Resources
- Key Partners
- Financial Model

Because the organization has never been there, the pathway to it consists of a series of linked hypotheses.

Tactical Planning Progress



7 Stages to Create a Strategic Growth Plan



LONG-TERM STRATEGIC PLAN

UNIQUE POSITIONING

Deliverables

Description

Plan & Team Structure

- Construction of the team to lead the planning process
- Guiding principles, goals, and measurements of success
- Obstacles that may inhibit progress
- Progress tracking to monitor success
- Communication protocol & plan to build engagement

LONG-TERM STRATEGIC PLAN

UNIQUE POSITIONING

Deliverables

Description

Data Analysis

- Where are you now? How did you get here?
- Potential Data Sources:
 1. Context Data
 2. Enrollment Data
 3. Financial Data
 4. Performance Data
 5. Community Data
 6. Competitive Data
 7. Accreditation Data
 8. Survey & Focus Groups Data
 9. New Family Data
 10. Audit Data

LONG-TERM STRATEGIC PLAN

UNIQUE POSITIONING

Deliverables	Description
Context	Who are you? Why do you exist? What do you believe? What do you value? Who do you serve now? Who do you want to serve? What makes you unique? What are your strengths? What is our organizational genius?

LONG-TERM STRATEGIC PLAN

UNIQUE POSITIONING

Deliverables	Description
Vision	An inspirational and motivational description of the ideal future of the school and it's community.

LONG-TERM STRATEGIC PLAN

UNIQUE POSITIONING

Deliverables

Description

Story

Even the best plan will fail to reach its full potential without a compelling story. The goal is to position the school as an ally in partnering with families in the target market to accomplish what they most care most about. This brand narrative will be clear, simple, and “sticky,” to drive energy and engagement across the campus and throughout the community.

LONG-TERM STRATEGIC PLAN

UNIQUE POSITIONING

Deliverables

Description

Priorities

Identify specific areas of focus that will produce the desired future. This includes establishing priorities with deadlines, ample resources, assignments, deliverables, and expectations. Consider how the school will celebrate progress and adapt to changing conditions.

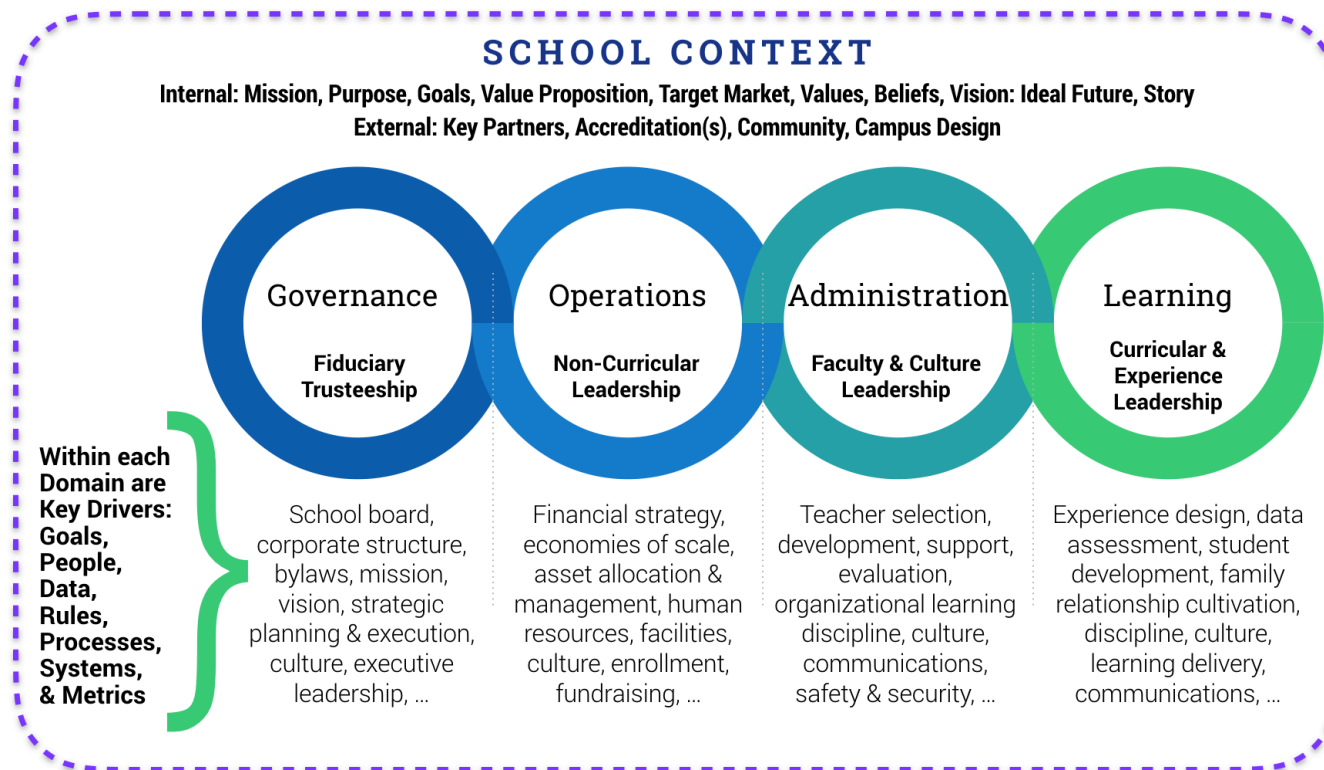
LONG-TERM STRATEGIC PLAN

UNIQUE POSITIONING

Deliverables	Description
Assets & Resources	Establish the financial and engagement plan with the goal of optimizing the assets of the school to support the vision and priorities but also to achieve economic viability and sustainability.

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.



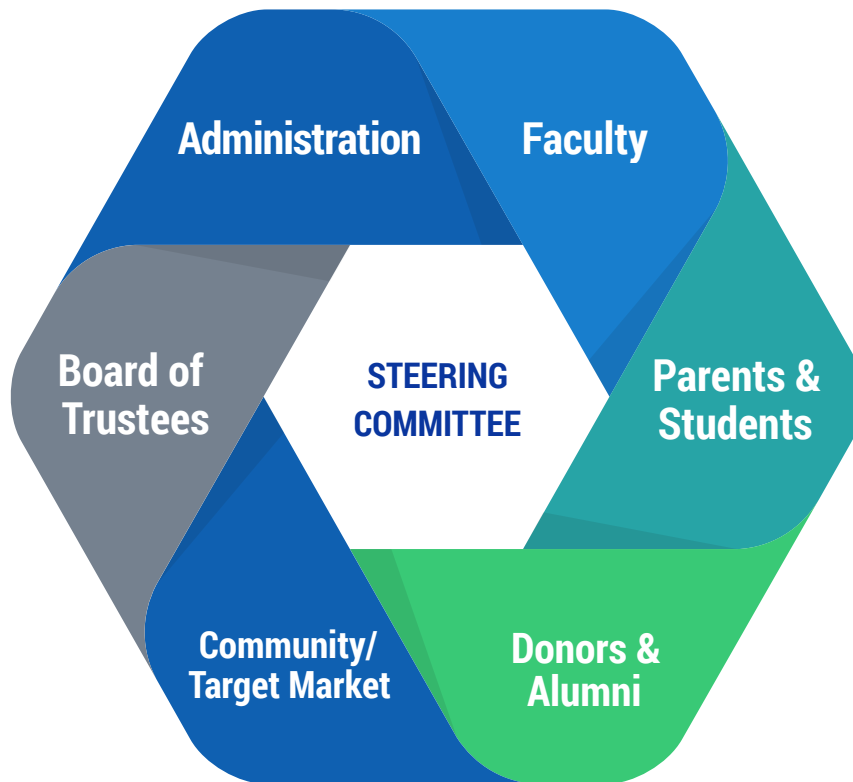
Through our extensive experience in designing and analyzing schools, we developed the School Growth Design Framework to describe the complexities of the educational organization and the vital interdependencies. Effective strategic planning for a school must recognize these constructs and the points of tensions that either limit growth or produce a healthy organization.

Your strategic plan must use a data-driven approach that optimizes the dependencies and relationships of these Domains and Drivers within the defined Context in order to produce sustainable growth and success. We utilize a 7-stage process for crafting such a plan, which is described below.

Stage 1

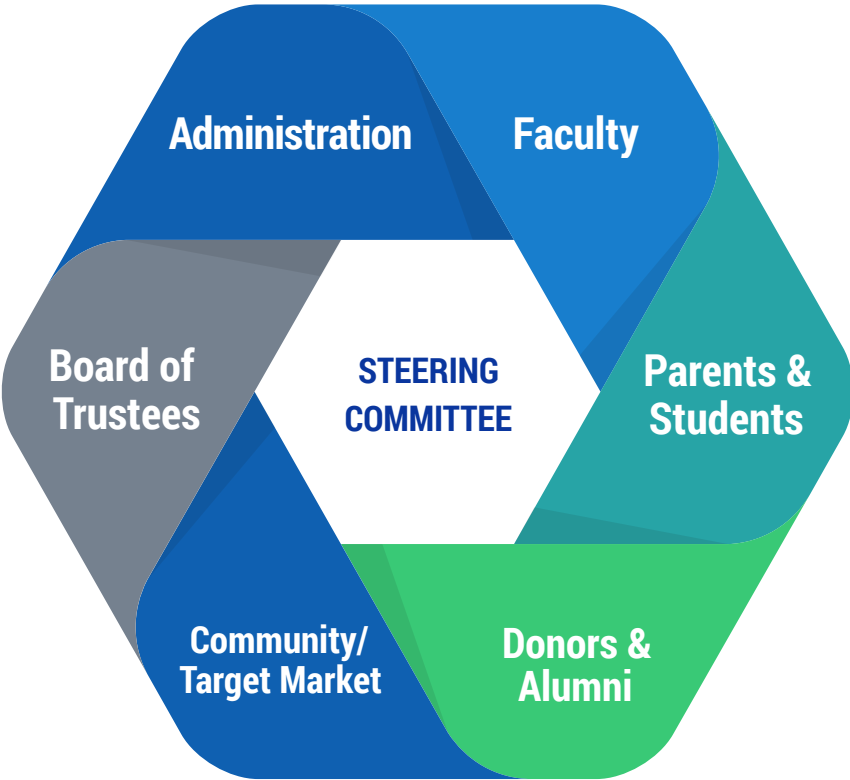
Plan & Team Structure

Strategic Plan Leadership Structure



STEERING COMMITTEE	<ul style="list-style-type: none"> • Manage the overall planning process in a manner that builds school-wide culture & engagement • Ensures Accurate Voice • Maximizes Leadership Team Resources • Collaboratively determine priorities • Collect and analyze data to produce reports
ADMINISTRATION	<ul style="list-style-type: none"> • Collaboratively determine priorities & goals • Ensure continued excellence in service • Build Internal Engagement • Create the Accreditation Self-Study • Establish school leadership priorities
FACULTY	<ul style="list-style-type: none"> • Contribute Institutional knowledge • Feedback on potential strategies and implementation • Assessment of culture and engagement
BOARD of TRUSTEES	<ul style="list-style-type: none"> • Clarify value proposition & ROI • Contribute institutional knowledge • Provide financial & business acumen • Define board priorities
PARENTS & STUDENTS	<ul style="list-style-type: none"> • Contribute family perspective • Build parent and student culture • Collaboratively determines priorities
DONORS & ALUMNI	<ul style="list-style-type: none"> • Contribute external and historical perspective • Help determine ROI
COMMUNITY/ TARGET MARKET	<ul style="list-style-type: none"> • Provide external and competitive perspective

Strategic Plan Leadership Structure



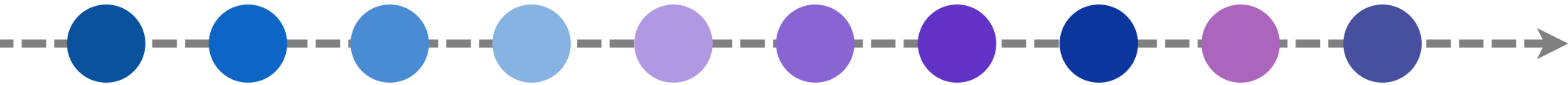
STEERING COMMITTEE	

7 Stages to Create a Strategic Growth Plan: Schedule



	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
Plan & Team Structure						
Data Analysis						
Context						
Vision						
Story						
Priorities & Timeline						
Assets & Priorities						

TIMELINE OF MAJOR EVENTS & LEADERSHIP CHANGES

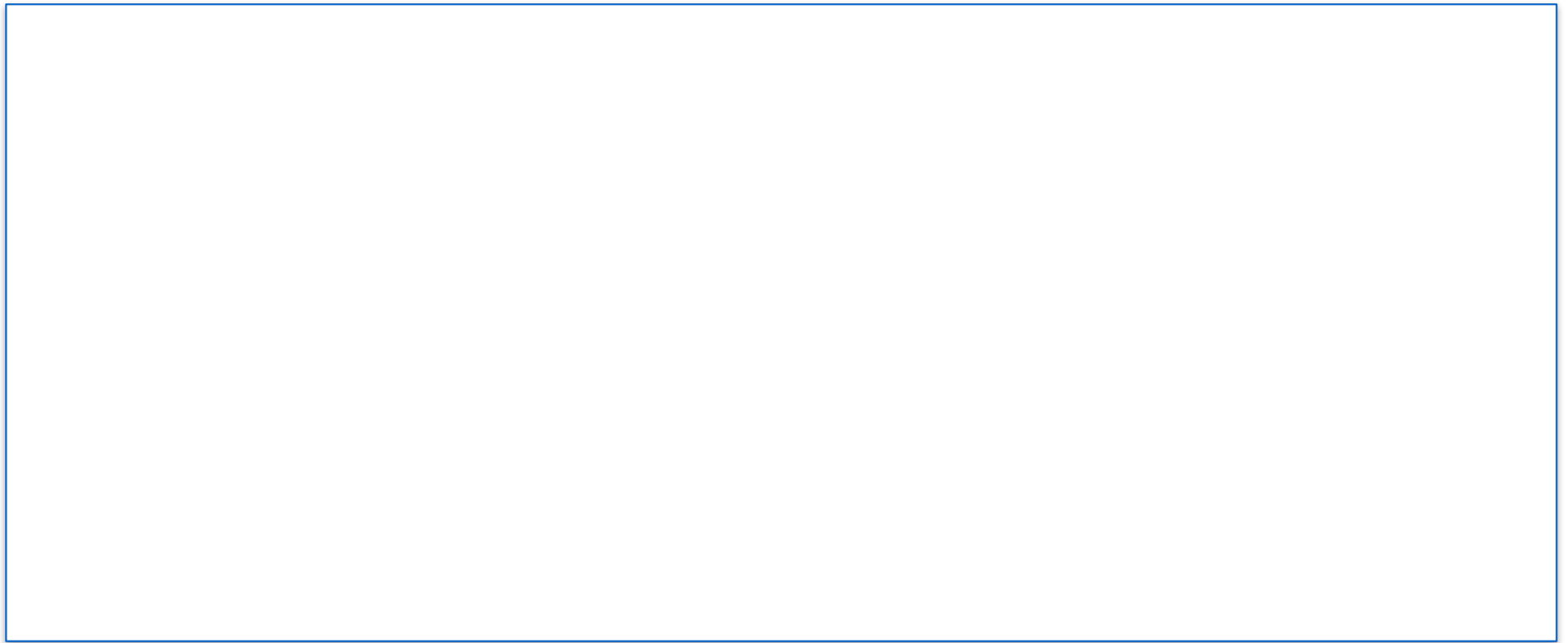


Glossary

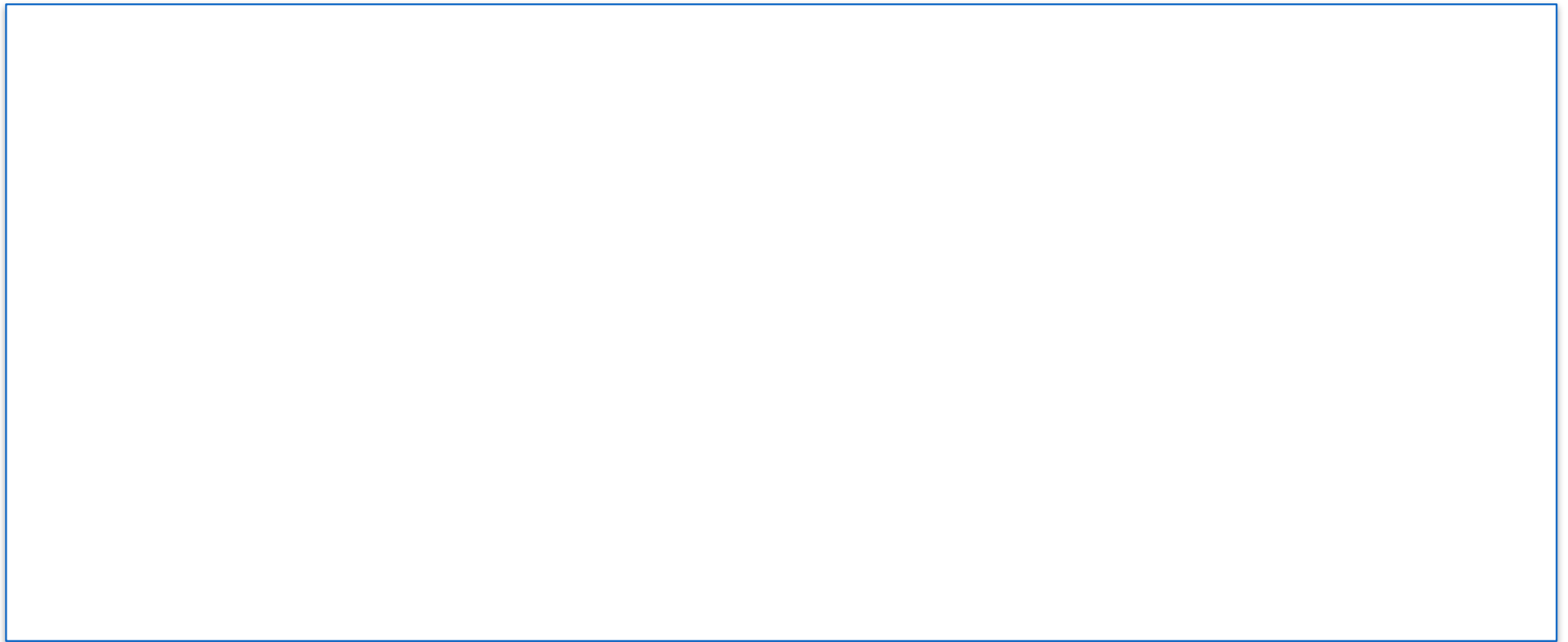
Keywords that have a specific meaning within your organization

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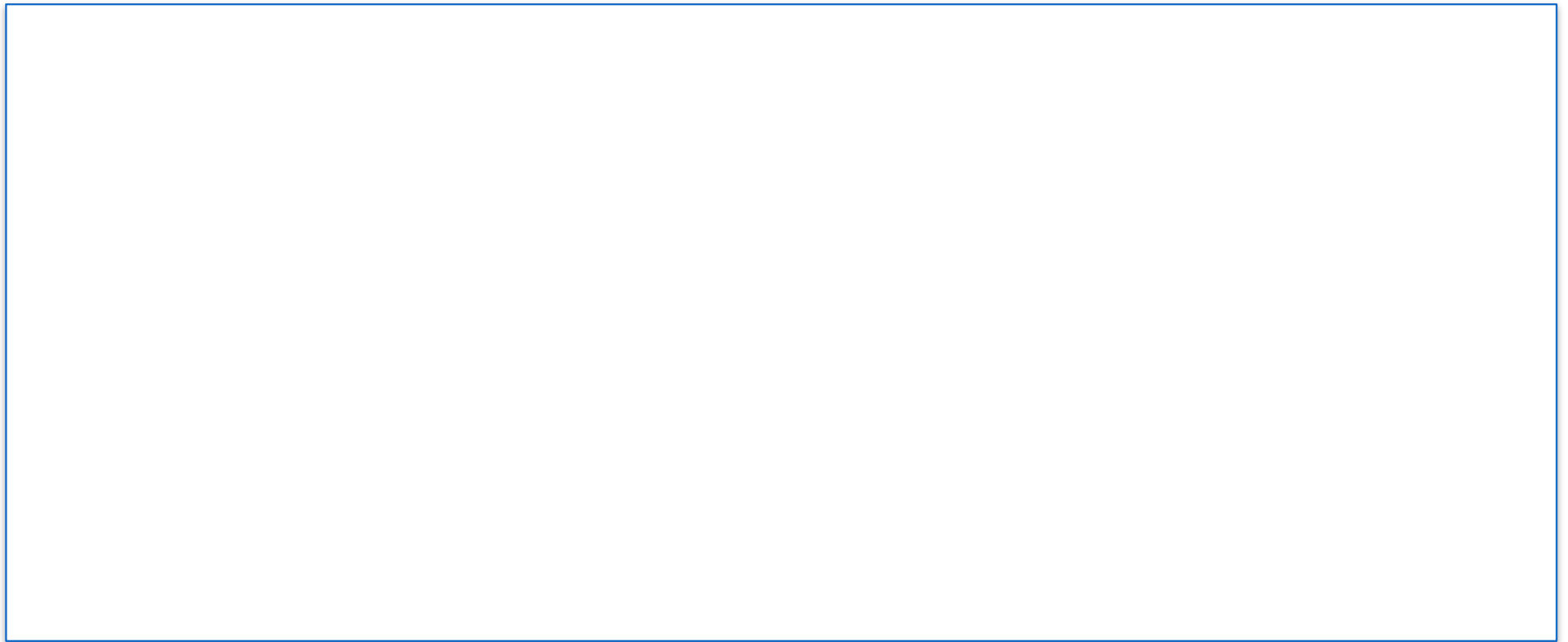
Guiding Principles



Plan Goals



Conditions of Satisfaction



School Key Performance Indicators



90

Re-Enrollment



88

Family Engagement



32

Talent Quotient



90

Response Time



52

Progressive Applicant Yield



81

Communication Flow



52

Cash Flow

Guiding Principles:



We believe this strategic plan should prioritize _____.

-

Committee Rules

- Confidentiality
- Communication Protocol
- Scope of Authority
- Decision Making Process
- All Voices
- One Voice
- No Secrets/No Surprises
-
-
-

Step 2 **Scheduled Messages**

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Message Title	Purpose	Media	Division	Originator	Sequence	Frequency
Strategic Plan Intro Letter					UP-Out-Down-Around	
Month 1 Board Report						
Survey Intro Letter						
Focus Groups						
Month 2 Update						
Month 4 Update						
January Board Report						
Survey Results Report						
February Update						
March Board Report						
April Board Report						
April Corporation Report						
Final Publication						

Step 2 Exceptional Messages

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Message Title	Purpose	Scope	Originator	Sequence	Frequency

Milestones

...

Milestone	Due Date	Expectations

Steering Committee Meeting Schedule













Date	Purpose	Location
9/11/18	Initial meeting of the Steering Committee to define common language, guiding principles & committee rules	On-campus
9/28/18	Planning Calendar, Surveys, and Focus Groups	

Stage 2

Data Collection & Analysis

Data Sources

 Previous Strategic Plan(s)	Research, Success, Incomplete Goals, Lessons Learned
 Enrollment Data	Historical Enrollment,
 Financial Data	Financial Indicators, Financial Aid
 Performance Data	Student Results, School Results
 Community Data	Demographics, Growth Trends, Projections
 Competitive Data	Features, Value Props, Story Points
 Accreditation Data	Commendations, Recommendations, Other Feedback
 Survey & Focus Group Data	Faculty, Current Families, New Families, Non-Reenrolled, Community, Alumni
 Audit Data	Talent Audit, Financial Audit, Enrollment Audit
 Other Sources	Previous Research

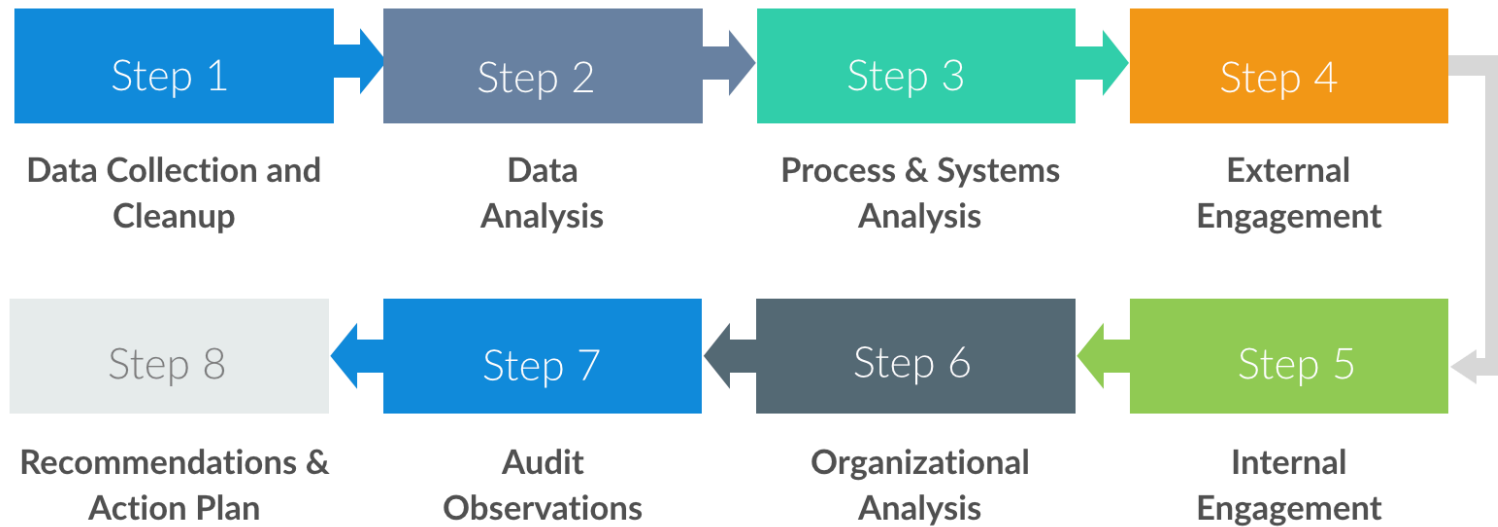
Stage 3: Data Sources

Data Sources	Purpose	Description

Competitive Strategy Canvas

High										
Offering Level										
Low										
	Facilities Quality	Curriculum	Relational Quality	Price	Special Services	Technology	Faculty Quality	Location	Innovation	Results

ENROLLMENT AUDIT PROCESS





Ready to Start Your Growth Plan?



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