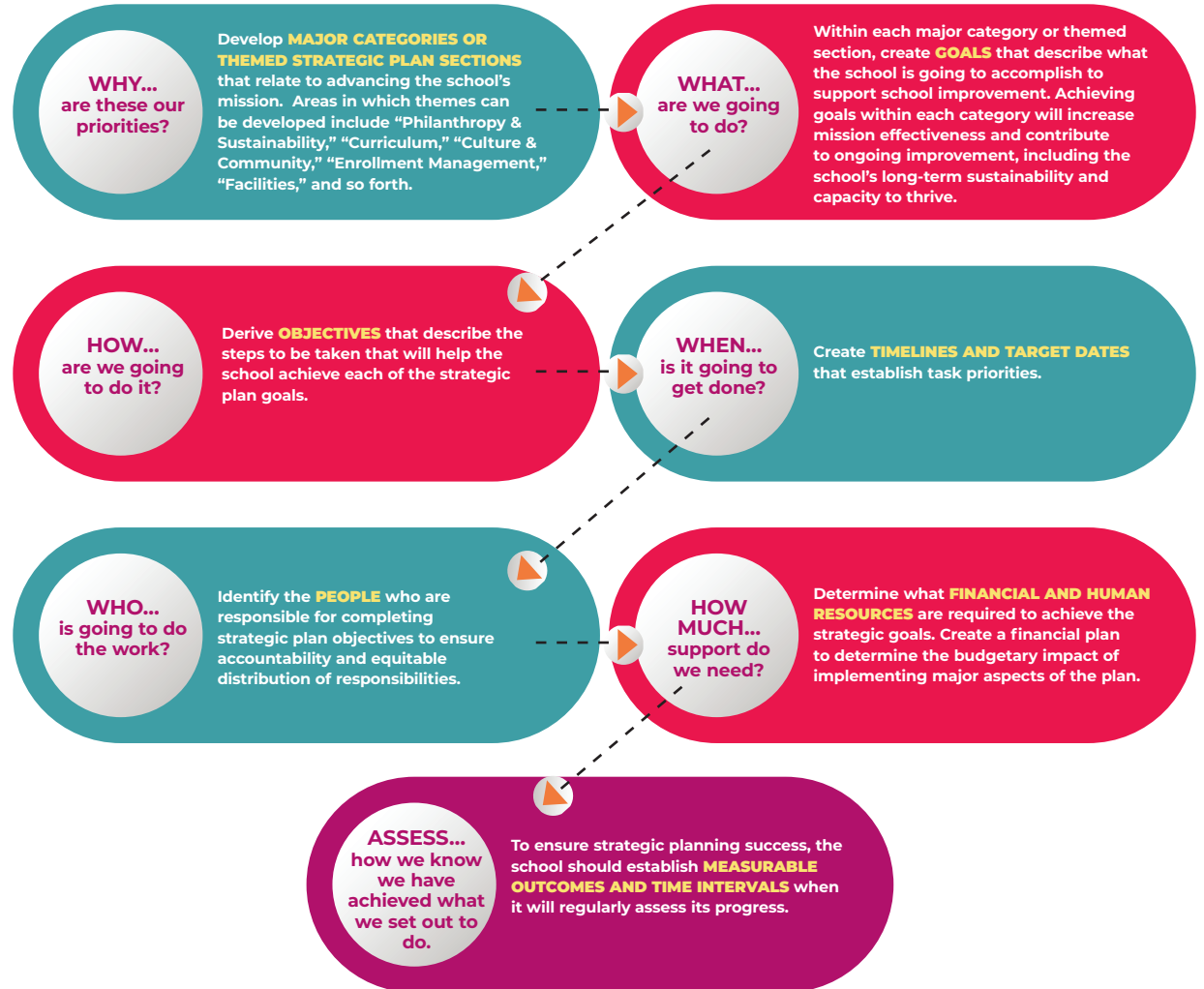


Strategic planning is essential to the long-term success of an independent school. It provides a framework and focus to achieve goals in key areas for improvement that contribute significantly to the school's ability to achieve its mission.

Many schools begin strategic planning by examining relevant data that indicates the school's current capacity to achieve its mission and by scanning the surrounding environment for factors that could significantly impact the school. Given its "big picture" perspective and strategic viewpoint, the board of trustees, in conjunction with the head of school, contribute significantly to identifying the strategic plan's major categories and goals. The school should also include constituent group input to ensure that everyone connected to the school has an opportunity to offer ideas toward the identification of major categories and goals. With a strategic plan in place, school employees typically identify the steps necessary to help achieve the strategic plan goals in priority order.

The strategic plan should be assessed and updated regularly. At these assessment intervals, school employees evaluate the success of the steps they have taken, and the board assesses the school's overall success in reaching the strategic goals. Based on the assessment, components of the plan may undergo iteration, revision, or refinement.

Across the landscape of independent schools, strategic planning takes on many time frames and structures. Some strategic plans set short- and long-term goals to be accomplished several years into the future. Others operate on a shorter time frame and include goals that can be adjusted annually. The vocabulary used to describe the strategic plan's structure can often vary among schools according to the method used in creating the plan. Regardless of the time frame or final structure, a strategic plan should address six questions: **Why? What? How? When? Who? How much?**



STRATEGIC PLAN SAMPLE FORMAT

INTRODUCTION

- Start with the school's mission
- Describe each of the strategic planning categories – how they were identified, and why they are important in helping the school achieve its mission more effectively

CATEGORY 1 [connects to the WHY – see above]

Goal A: [WHAT to accomplish]

Objective 1 [HOW]

Timeline, Responsibility [WHEN & WHO]

Objective 2 [HOW]

Timeline, Responsibility [WHEN & WHO]

Etc.

Goal B: [WHAT to accomplish]

Objective 1 [HOW]

Timeline, Responsibility [WHEN & WHO]

Objective 2 [HOW]

Timeline, Responsibility [WHEN & WHO]

Etc.

FINANCIAL PLAN [HOW MUCH]

ASSESSMENT:

- Describe the assessment intervals and how success will be measured.
- Use the same format to complete the strategic plan outline for each category.

STRATEGIC PLAN EXAMPLE

Our school seeks to educate a diverse student body, equipping them with the skills necessary to thrive in a globally connected community. To enhance our school's capacity to fulfill its mission, our strategic plan includes the following categories/themes:

CATEGORY 1 (WHY): Live out our mission's commitment to diversity by increasing student access to our school.

Goal A (WHAT): Increase the student financial assistance budget.

OBJECTIVE 1 (HOW, WHEN, WHO): The advancement office will raise \$250,000 in restricted endowment for financial assistance over the next three years.

Resource impact (HOW MUCH): \$15,000 in operating budget for building connections with potential donors; redirect 15% of advancement assistant's time to donor management by eliminating afternoon parent coffees

Assessment: Quarterly reports from advancement office about donor cultivation and financial commitments toward goal

Goal B: Increase accessibility for working families that live outside the immediate area.

OBJECTIVE 1: Division directors will work with families to develop parent carpools in target areas of Knox and Josephine Counties for the next academic year.

Resource impact: Meeting time for division directors to meet with families who live in the target areas

Assessment: Six-month check-ins with division directors. Two new carpools created for the next academic year

OBJECTIVE 2: Staff will expand before- and after-care to begin at 7:00 am and end at 6:00 pm within two academic years.

Resource impact: \$50,000 to hire and pay for additional staff; staff time for the hiring process and employee management

Assessment: Increase care staffing by 1 FTE for before-care and another FTE for after-care by the end of Years 1 and 2 respectively.