



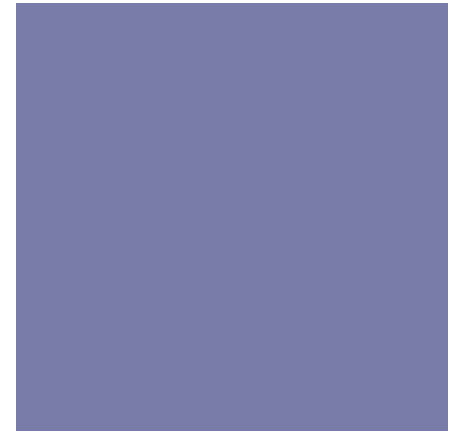
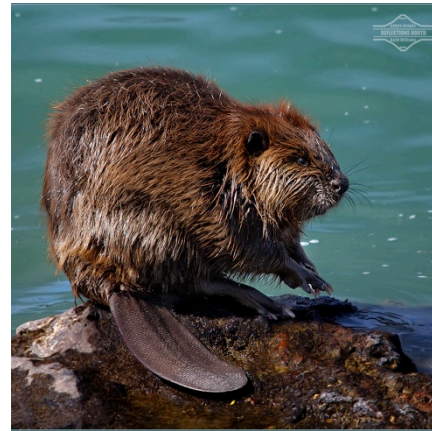
# Creating Your School's Strategic Future

Association of Colorado Independent Schools  
Jean Orvis  
March 15, 2019



# Beavers, the Fur Trade, and Prince Albert.

Uhh...What's this got to do  
with schools???

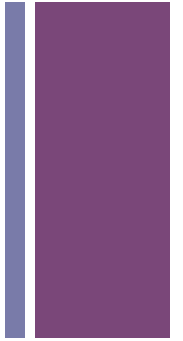


# + Problems With Strategic Plans

- The process is driven by accreditation and becomes a pro forma, “Let’s just get it done (and forget it).”
- It’s a “To Do” list, not a Strategy
- The plan focuses on technical issues such as the need for gym repairs or declining enrollment rather than adaptive challenges such as “What kind of school will prepare students for a radically different economy?”
- Too much effort on PLAN; Too little effort on ACT
- They become dust catchers.



# + Strategic Planning in 1850?



## Goal: Increase Supply of Beaver Pelts

- Establish additional trading posts In Oregon Territory
- Offer 10-15% more/pelt than our competitors to lure trappers and Native Americans to our trading posts
- Expand shipping capacity on Puget Sound to speed delivery to Europe



# The Inherent Problem with Strategic Plans



They project a future based on a known present, basically asking the question “How can we do better what we are already doing?” rather than “How will our organization survive and thrive in an UNKNOWN future?”



# The Hudson Bay Company



# + Some Terms



- Strategic Orientation/Strategic Thinking
- Strategy
- Strategic Framework versus a Strategic Plan



# A Strategic Orientation/Strategic Thinking



- ◆ **Ongoing**, continuous ability to envision and plan for the school's future.
- ◆ **Multi-dimensional**, links various aspects of the organization: *mission, vision, trends, internal and external realities, competitive pressures, constituency base, emerging technology, program approach, organizational structures.*
- ◆ **Flexible**, nimble, creative, research-based, values-based
- ◆ **A fundamental leadership competency.**

***“If I had asked people what they wanted, they would have said a faster horse.”***

**Henry Ford**

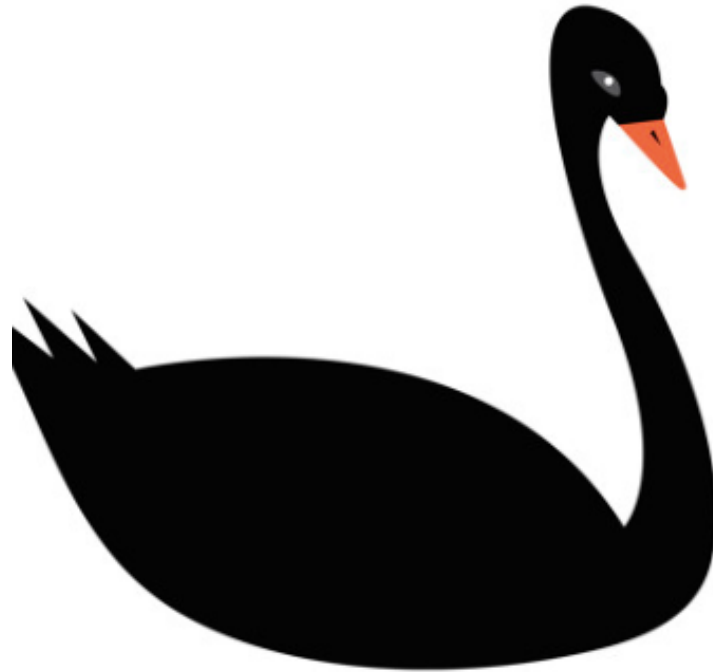




# Black Swan Events: Those We Don't Expect



- **High impact of a highly improbable event, such as:**
  - Prince Albert's new silk top hat
  - 9/11 terror attacks
  - 2008 financial crisis
  - Major weather events



# + Those Challenges We Know Exist



**Who can afford us?**

**What work will be available in the future for our students?**

**How will evolving technology impact our lives and our schools?**

**What should we teach, and how should we teach it?**

**Do we know our market?**

**What *is* school?**

**Why should you choose our school? What is our value proposition?**

# + The Learning Environment



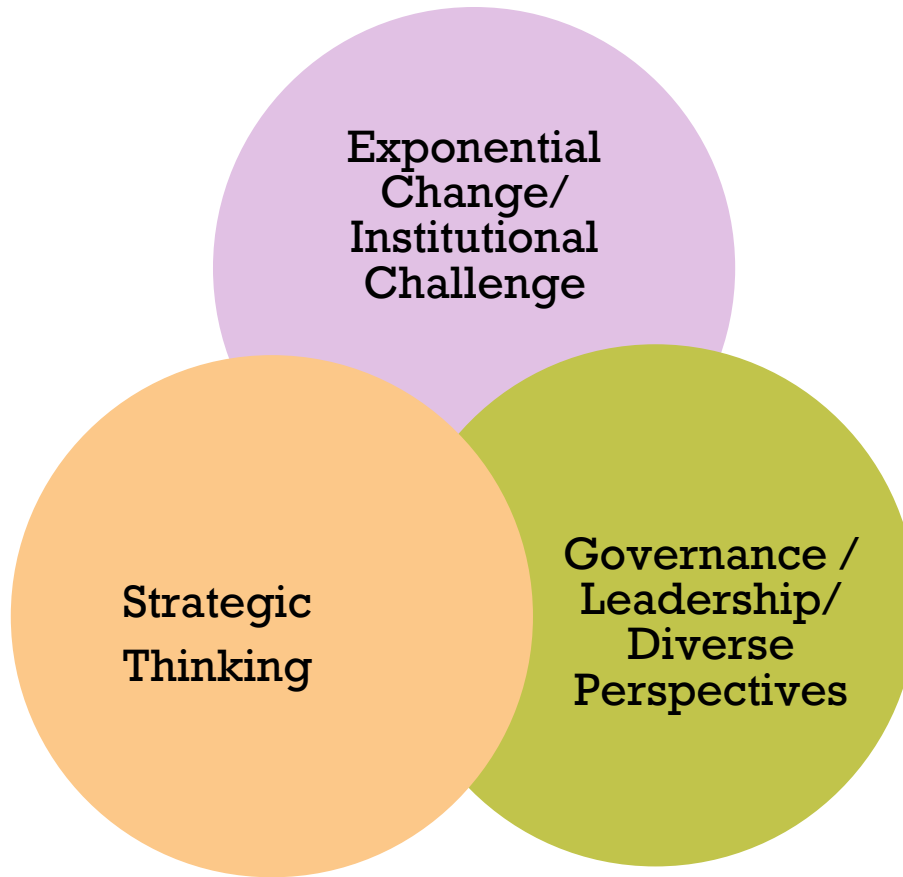
“A school’s **learning environment** is the only thing the school can claim as its product.”

Robert Kaplan, Harvard Business School

**Example: Mission Hill and the IB Program**

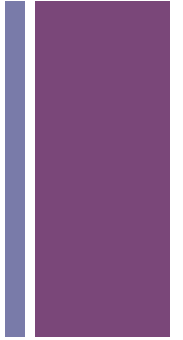


# A Strategic Orientation in Action





# Strategic Thinking: The Key Questions



1. Our “Why?”
2. Who are we? Who do we want to be?
3. Where are we going?
4. How will we get there?

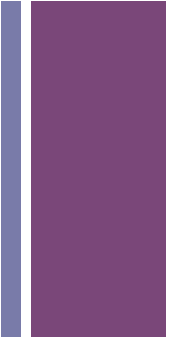
# + Our “Why?”



- Why do we exist?
- Why should people choose us?
- What would the broader community lose if we didn't exist?
- What is at the core of our school's identity and must remain immutable?

**Example: St. Thomas Academy → Thomas Academy**

# + Philosophical Time-Out

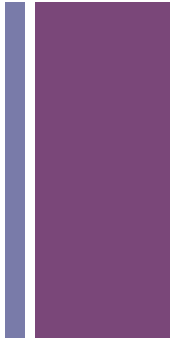


As an industry (independent education), what is  
our “Why?”



# Who Are We?

- What is our core purpose (mission)? Relevant?
- Whom do we serve?
- What do we do really well?
- What aren't we doing well?
- What are the most profound changes shaping our environment?
- What is our current business model? Is it sustainable?
- What do people say about us, both to our faces and behind our backs?





# + Think: “Face the Brutal Facts”



## Three Painful Examples:

- The “School That Forgot to Get With the Times”
- The “Plain Vanilla” School
- The “Crazy Little Art School in the CD”

(CD = code for high crime/high violence neighborhood)

# + Who Do We Want to Be?

- What is our most compelling aspiration? Who should we become?
- What is the profile of our future graduate? What do we want to be known for?
- What kind of learning environment develops these qualities?
- What are the top three opportunities on which we should focus our efforts?
- What will our future business model be?
- How will we know we have succeeded?



# + SWOT Analysis

## STRENGTHS

- What advantages do we have?
- What do we do better than anyone else?
- What unique resources do we have?
- What factors cause students to enroll?

## WEAKNESSES

- What could we improve?
- What do people in our market see as our weaknesses?
- What factors drive students/families to enroll in other schools?

## OPPORTUNITIES

- What interesting trends can we spot?
- Which of our strengths open up opportunities?
- Which of our weaknesses open up opportunities if we eliminate them?

## THREATS

- What obstacles do we face?
- What are our competitors doing?
- Is changing technology a threat to us?
- What financial factors could undermine us?
- Could any of our weaknesses become threats?



# SOAR Analysis

## STRENGTHS

- What do we excel at?
- What are our greatest accomplishments?
- What makes us unique?
- What do we have or do that's better than anyone else?

## OPPORTUNITIES

- What partnerships would lead to greater success?
- What changes or trends in the market align with our strengths?
- Are there gaps in the market we could fill?

## ASPIRATIONS

- What do we want to achieve in the future?
- How can we make a difference?
- What are we passionate about?
- What strategies or actions support our perfect future self?

## RESULTS

- What measures will tell us we are on track to achieve success?
- How do we translate our vision into tangible outcomes?
- How will we know when we've achieved our goals?

# + Where Are We Going?



- ◆ What direction will help us achieve our mission and become who we want to be ?
- ◆ What are the possible roads we can take?
- ◆ What will the impacts of these endeavors be on the community?
- ◆ How will we know we have arrived?

**Example: “We will control our destiny by owning our own campus.”**

# + How Will We Get There?



- What are the top three opportunities on which we should focus our efforts?
- Can we turn any of the threats into opportunities?
- How can we bridge the gap between what we have and what we want?
- What synergies or partnerships can we create with other groups?
- We can't be all things to all people; what **trade-offs** are we willing to make?

# + The Plain Vanilla School



## ■ Re-think the mission

*We are committed to developing each student's potential to become an intellectually courageous, socially responsible citizen of the world.*

## ◆ Programmatic Changes

*Reimagine the schedule to allow time for community building and projects that increase engagement, deepen learning, and encourage intellectual courage.*

Trade-off: The school dropped AP classes

# + What is “Strategy?”



A set of goal-directed actions designed to gain and sustain ***a competitive advantage***



+ But we are a SCHOOL, not a for-profit corporation!!

**Yes, but each school competes with other schools for**

- ◆ students
- ◆ faculty
- ◆ administrative talent
- ◆ trustees
- ◆ real estate
- ◆ donor dollars
- ◆ name recognition and reputation



# What is a competitive advantage?



- The ability to achieve superior performance relative to competitors in the same industry
- *A sustainable competitive advantage* is the ability to outperform competitors over a prolonged period of time

**Example:** In smartphones, Apple has achieved a competitive advantage over Samsung, Microsoft and BlackBerry

***In a school, a competitive advantage is the value and benefit you offer your students and is distinct and considered superior by your families.***

**(N.B. Read NAIS Research “Why Parents Enroll Their Children in Independent Schools”)**

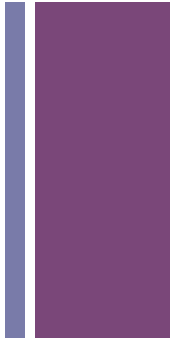
# + Examples of Competitive Advantages

## ■ Asset advantages

- Better program design leading to better outcomes
- Location
- An attractive or specialized building that enhances program delivery
- Networks or partnerships
- Robust funding base
- Great name recognition and reputation
- A well-connected board

## ■ Execution advantages

- Lower costs
- Greater efficiency in delivering programs or services/dollar spent
- Flexibility
- Stronger community and loyalty
- Sound marketing and communications
- Better accountability



# + Leveraging a Competitive (dis)Advantage





# Seattle Academy's Strategic Journey



- Use the low cost facilities advantage to funnel funds into faculty and programs
- Leverage the urban environment to extend classrooms, enhance programs, and engage students in public service
- Innovate and lead in technology integration (laptops, software development, cross-curricular projects, robotics, AI)
- Seize market share; attract, support and retain a diverse community
- Control our destiny by owning our own campus
- Protect the Organizational Soul while the Organizational Body is growing
- Develop non-tuition revenue streams





# + “Strategy” Means Being Different “Strategy” Means Making Choices

## I K E A

## Ashley Home

Targets young furniture buyers who want style at a low cost

Self-service; Customers wander through the large warehouses, following a yellow path painted on the floor.

Furniture displayed in room-like settings

Customers transport and assemble the furniture themselves

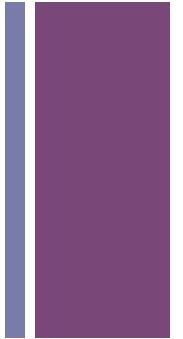
Targets different consumer segments

Salespeople escort customers through the store

Showrooms display samples of the merchandise, such as rooms full of sofas or dining sets

Items represent only a fraction of the available options, catalogued in sample books

Items delivered in 6-8 weeks





# A Strategic Framework versus a Strategic Plan



## **Mission:**

**Enduring educational purpose**

## **Distinctions:**

**Unique qualities and programs that distinguish you from your peers**

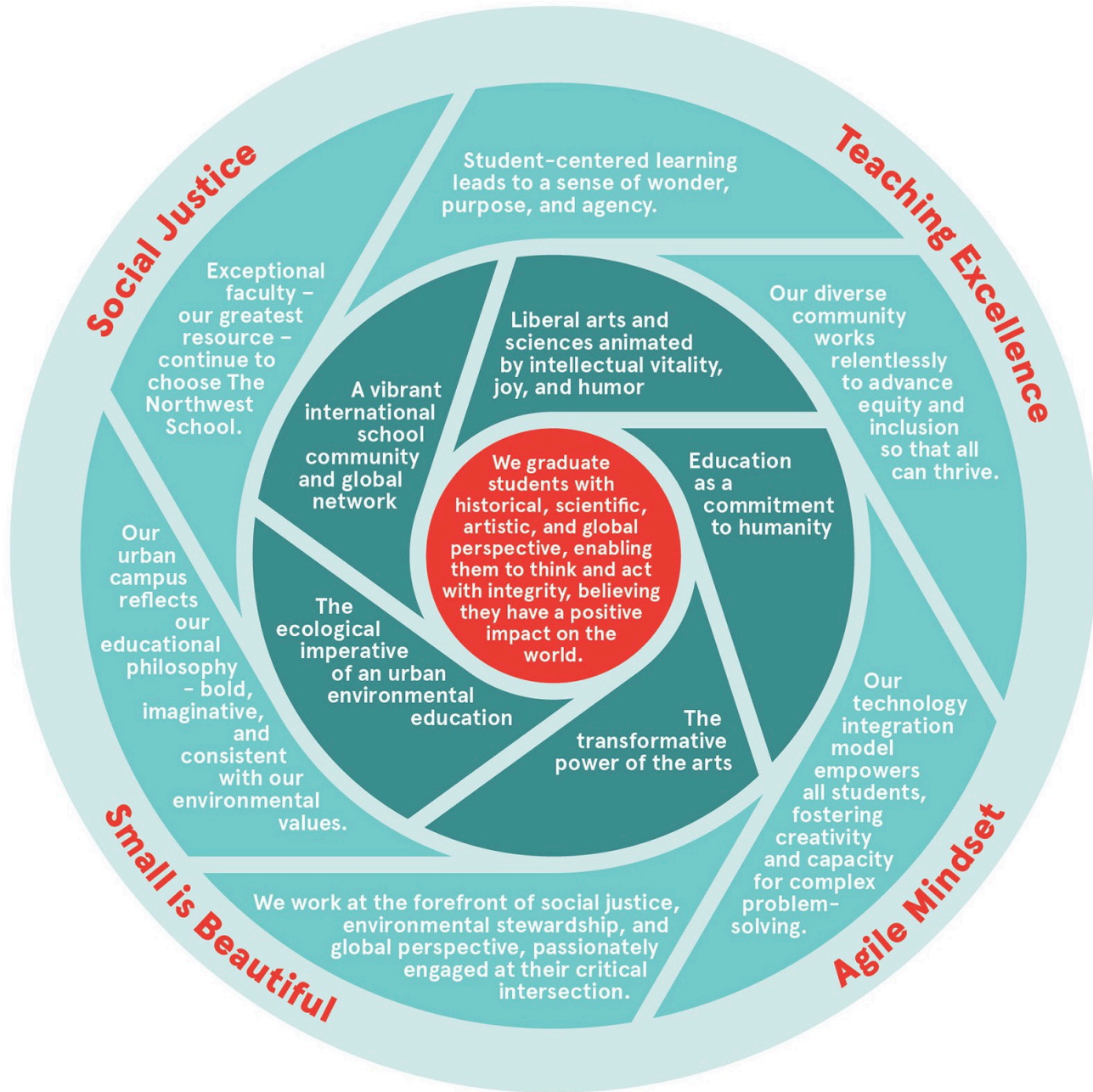
## **Directions:**

**The work you need to do to achieve your vision, support the mission, leverage strengths, and improve your value to students and families**

## **Principles (Core Beliefs)**

**These guide your work with the student's experience and outcomes at the center of our efforts.**





# + Activity/ Discussion



In your school groups (or if you are the only representative of your school, please join with other non-competing “singles”) to discuss:

What do you believe to be your school’s competitive advantage, *i.e., the value and benefits* you offer your students and families, that are *distinct from other schools?*



## IMPLEMENTATION

*“Plans (Strategies) are only good intentions unless they immediately degenerate into hard work.”*

Peter Drucker

# + Strategic Implementation

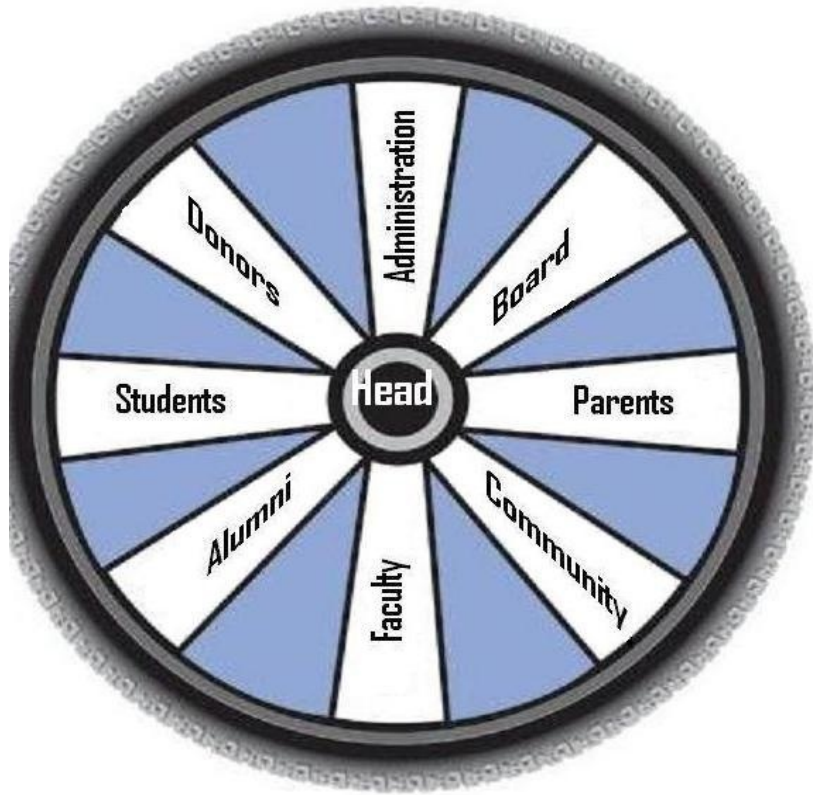


*“Execution matters. Period. It doesn’t matter how brilliant your strategy is in principle if execution is hit and miss.”*

- ◆ Requires ACTION
- ◆ Requires an accompanying Strategic Financial Plan
- ◆ Plays out through the Annual Plans of the Board and Administration
- ◆ Requires constant evaluation and adaptation to ensure plans are leading the school toward the vision, meeting the needs of current students, and staying true to principles and values



# The Constituency Wheel : Dynamic Tensions



“Culture Eats Strategy  
For Breakfast”

*Peter Drucker*

**Antidote:** Inclusion,  
Engagement , and an Ethic  
of “Students Come First.”

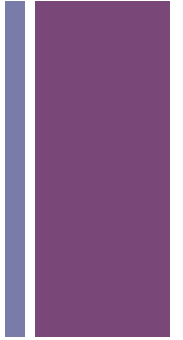
# + “Fire Bullets, Then Cannonballs”

Jim Collins, *Great by Choice*



- A low-cost, low-risk, low-distraction experiment to figure out what will work, i.e., calibrating your line of sight by taking small shots.
- Once you have your empirical validation, you fire a cannonball (concentrating resources into a big bet.)

# + The Role of the Board



## **A fiduciary responsibility to:**

- Secure the school's long-term viability
- Watch for and respond to risks on the horizon
- Engage in long-term, big picture thinking
- Own the strategic initiatives



# Why effective governance matters:



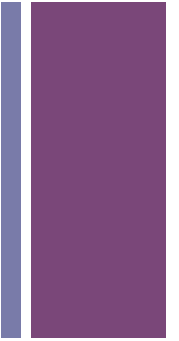
**The quality of the board determines the future of an organization.**

A school can be no better than its governance. A school with good governance can have unlimited potential. A school with poor governance is destined to mediocrity at best.”

Thomas Hoer, *School Leadership for the Future*.



# + Board Composition



# + Avoid the Rip Van Winkle Problem



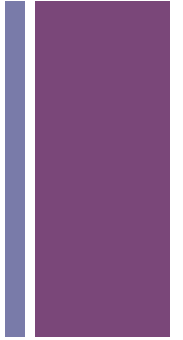
# + But...

Amazingly, when queried, many trustees cannot articulate their school's strategic vision and aren't sure if one exists.





## A Board Head Relationship Characterized by Mutual Trust and Understanding



### Nature of the relationship: “Quirky and Complex”

- A partnership rooted in mission, shared vision, values and goals
- Clarity of roles and responsibilities
- ***Governance is not management***
- **Same Paged-ness:** the Board speaks with one voice
- Trust, respect, **support**, and no surprises

# + Discussion



*In mixed school groups, discuss :*

**What are the greatest challenges you encounter in your strategic efforts?**

- \* Time?
- \* Board Commitment?
- \* Implementation?
- \* Other?



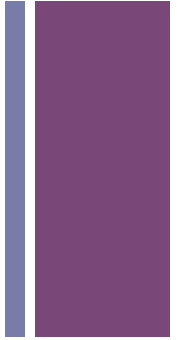
+ Self-Assessment,  
Accountability, and Open  
Communication

# + The Questions



- How do we know we are who we say we are?
- How do we know we have become who we want to be?
- How do we define and measure culture and climate?
- How do we define and measure success?

# + Assessment Dilemmas



“In God we trust, all others brings Data.”

Margaret Spellings, Secretary of Education

“Not everything that counts can be counted, and not everything that can be counted counts.”

William Bruce Cameron



# + Effective Use of Data



**The “Prove It” generation of parents and consumers.**

- What data should schools collect and how should it be used?
- How do schools find the time for data collection and analysis?

# + Open Communication



How can a board contribute to a culture of trust, honesty and openness...

- With the Head of School?
- With the community as a whole?



# Discussion Questions



- What data do you routinely collect?
- What measures do you find are most useful to assess school health?
- How do you track, evaluate and measure your strategic initiatives?
- How does your school define and measure success?

# + Take-Aways



- For our schools to survive and thrive, boards must have a strategic orientation, a critical leadership competency for our era.
- Fundamentally , “strategy” is creating a competitive advantage for your school, which means that the value and benefit you bring your students is clear and superior to other options for your families and students.
- The only product we offer is the learning environment. Focus on THAT.
- Your strategy is a bundle of coordinated actions designed to achieve a strategic vision.

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