

# How to Operationalize Your Strategic Plan and Ensure its Ultimate Success

ACIS 2022



Denver Academy of Torah



ST. ELIZABETH'S SCHOOL



MONTESSORI SCHOOL OF EVERGREEN



WATERSHED SCHOOL



SIMARY'S ACADEMY  
FAITH COMMUNITY JUSTICE RESPECT

BCD  
BOULDER COUNTRY DAY SCHOOL



Escuela de Guadalupe  
founded 1999

FRIENDS SCHOOL



Challenging minds, nurturing spirits.



Extraordinary Education. Timeless Traditions. Inspired Lives.

Colorado Rocky Mountain School



Learning to Soar



MONTESSORI School of Denver



DAWSON SCHOOL



THE MCCLELLANDSCHOOL  
CURIOSITY & EXPLORATION. PERSISTENCE. ACHIEVEMENT. FAMILY & COMMUNITY

DENVER ACADEMY  
The Way You Learn Best

PLANNING FOR TODAY  
ENVISIONING TOMORROW



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**Planning for Today; Envisioning Tomorrow**



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*M*ission minded



## **Romayne Levee**

**Partner & Director of Education  
Strategy**



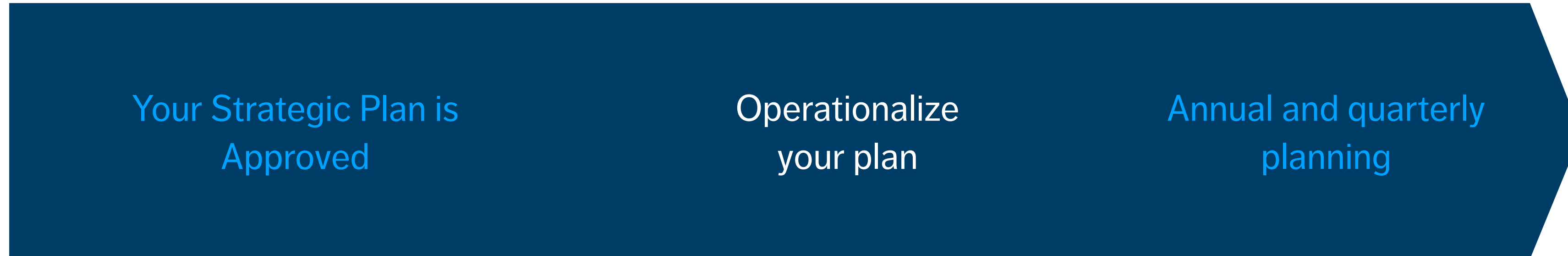
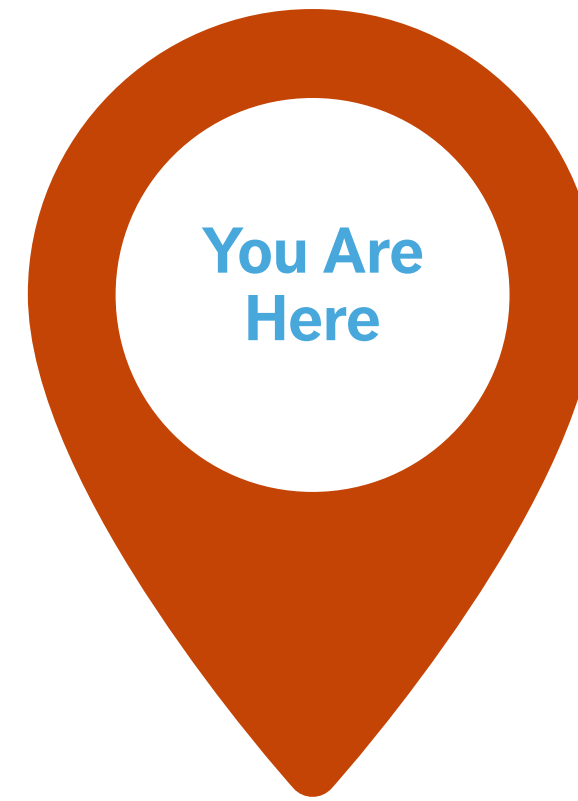
## **Abbey Meyers**

**Senior Strategist & Manager of  
Communications**

# Agenda

1. What is implementation planning?
2. What makes a successful implementation plan?
3. The building blocks
4. Developing your “priority cards”
5. Exercises

# Where We Are



**Strategic  
Planning**

**Implementation  
Planning**

**Plan  
Execution**

**PLANNING**

**IMPLEMENTATION**



# Implementation Plans Account For:

- People
- Resources
- Structure
- Culture
- Timelines
- Systems
- Communication
- PROCESS

# A Successful Implementation Plan

**Successful  
implementation**

Clarifies and  
communicates

**Successful  
implementation**

Engages  
stakeholders

**Successful  
implementation**

Keeps the work  
alive

**Successful  
implementation**

Allocates  
resources

**Successful  
implementation**

Accounts for  
structural adjustments

**Successful  
implementation**

Monitors and  
evaluates progress



**Successful  
implementation**

Keeps your  
students at the  
center

# Definitions / Strategic Planning Jargon



Severn School




# LEADERSHIP REIMAGINED

STRATEGIC PLAN: 2022





# Redefining EXCELLENCE

Marlborough STRATEGIC PLAN: 2020-2025




# Envision Our Future



 **Curtis School** | STRATEGIC PLAN 2019-2024

# A BOUNDLESS

Vision of Success




The **Agnes Irwin School**  
2022-2027 STRATEGIC PLAN

# From Strength to Greatness

## STERNE SCHOOL

STRATEGIC PLAN 2020-2025




# Our Values in Action

New Garden Friends School  
Strategic Plan  
2022 - 2025

# Commitments, Priorities, and Tactics

## What's the difference?

**Strategic commitments:** Promises you make that bind your school to a future course of action.

**Strategic priorities:** Initiatives that enable you to deliver on the promise of each commitment.

**Tactics:** The steps you must take for each priority to succeed.

# Example: Organization 1

## Environmental protection organization

*We **commit** to improving the health of the nation's rivers and addressing the impacts of climate change.*

### Priorities:

- Achieve optimal flow, connectivity, water quality, and river health by protecting and restoring habitats.
- Plan, implement and measure river basins or collections of rivers and streams sharing common biogeographic characteristics.
- Protect river ecosystems— streams, wetlands, floodplains, and riparian corridors—against the adverse impacts of climate change.
- Equitably engage, benefit, prioritize the values and needs of—and mitigate harm to—communities of color and historically marginalized communities along our nation's rivers.

# Example: Organization 2

## Healthcare Foundation

*We **commit** to breaking the cycle of domestic violence.*

### Priorities:

- Reduce exposure to domestic violence by supporting early interventions and practices that help children and families most at risk.
- Prevent adolescent relationship violence through youth engagement models and programs.
- Focus on community—and family—based strategies that leverage collaborations, networks, and coalitions to harness cross- sector resources and create more holistic solutions for families and adults impacted by domestic violence.
- Raise public awareness and generate new policies that will counteract negative social norms and reduce stigmas that inhibit people from taking action.
- Contribute to selected data needs on effective prevention solutions.

# Example: Organization 3

## Girl's school, grades 7-12

*We **commit** to transforming our community so that equity is at the heart of our school's education.*

### **Priorities:**

- Through active recruitment, build a student community that more closely reflects the diversity and culture of our city.
- Conduct a strategic assessment of the financial aid program and expand access in line with needs expressed in the applicant pool, ensuring no financial barrier stands between any qualified student and our school.
- View on-boarding and support services through the lens of equity to ensure all members of our community are able to access the highest levels of our program.
- Advance our equity and inclusion work and imbue these habits of mind into our community ethos.

# Commitments, Priorities, and Tactics

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# Priority Cards

# Your Strategic Plan

Commitment 1	Commitment 2	Commitment 3	Commitment 4
P1	P1	P1	P1
P2	P2	P2	P2
P3	P3	P3	P3

# Priority Card #

## Commitment Name

## Priority

- Critical
- Important
- Desired

## Benefit to Stakeholder

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## What's the Commitment?

## What's the Priority?

## Action Steps

*Year One*

*Year Two*

*Year Three*

*Year Four*

*Year Five*

## Timeframe

2023 2024 2025 2026 2027

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## Key Performance Indicators

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### Budget

### Responsibility

# Priority Card #

<b>Commitment Name</b>	What's the Commitment?			
<b>Priority</b>	What's the Priority?			
<input type="checkbox"/> Critical	<b>Action Steps</b>		<b>Timeframe</b>	
<input type="checkbox"/> Important	Year One		2023 2024 2025 2026 2027	
<input type="checkbox"/> Desired	Year Two			
<b>Benefit to Stakeholder</b>	Year Three		<b>Key Performance Indicators</b>	
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer nec odio. Praesent libero. Sed cursus ante dapibus diam. Sed nisi. Nulla quis sem at nibh elementum imperdiet. Duis sagittis ipsum. Praesent mauris. Fusce nec tellus sed augue semper porta. Mauris massa. Vestibulum lacinia arcu eget nulla. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer nec odio. Praesent libero.	Year Four		_____	
	Year Five		<b>Budget</b>	<b>Responsibility</b>

# Priority Card #

## Commitment Name

**Priority**

- Critical
- Important
- Desired

## Benefit to Stakeholder

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*Year One*

*Year Two*

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*Year Five*

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2023 2024 2025 2026 2027

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## Key Performance Indicators

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### Budget

### Responsibility

# Definition - Priority Level

Priority
<input type="checkbox"/> <b>Critical</b>
<input type="checkbox"/> <b>Important</b>
<input type="checkbox"/> <b>Desired</b>

**Critical** - If we could only do few priorities, this would be one of them. It's mission critical!

**Important** - This priority will have a significant impact on realizing your mission, but all would not be lost if it wasn't achieved.

**Desired** - The first thing to be eliminated from a to-do list if resources dried up.

## Elementary School (K-6)

*Commitment: Our students will have the ability and agility to see and make meaning out of information in both a reflective and innovative way.*

### **Priorities:**

- Fully integrate a K-6th-grade curriculum and assessment philosophy through which students develop skills to effortlessly shift between disciplines and demonstrate their learning through a variety of forward-thinking measurements of academic and social competencies.
- Ensure teaching excellence in every classroom and engage faculty in a collaborative structure that supports individual, professional, and institutional growth.
- Empower learners to effectively use technology as both creators and consumers.
- Create flexible, state-of-the-art spaces for learning, making, and creating.
- Create a culture where parents and alumni networks understand and engage with the curricular priorities of the school.
- Identify and create non-tuition sources of revenue to ensure master teaching excellence in every classroom.

# Priority Card #

## Commitment Name

## Priority

- Critical
- Important
- Desired

### Benefit to Stakeholder

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## What's the Commitment?

## What's the Priority?

## Action Steps

*Year One*

*Year Two*

*Year Three*

*Year Four*

*Year Five*

## Timeframe

2023 2024 2025 2026 2027

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## Key Performance Indicators

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### Budget

### Responsibility



## Example:

*Commitment: Our students will have the ability and agility to see and make meaning out of information in both a reflective and innovative way.*

## Priority:

- Create flexible, state-of-the-art spaces for learning, making, and creating.

**Exercise:** Write a one-two sentence student benefit statement about this priority.

# Priority Card #

## Commitment Name

## Priority

- Critical
- Important
- Desired

## Benefit to Stakeholder

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## What's the Commitment?

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*Year One*

*Year Two*

*Year Three*

*Year Four*

*Year Five*

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2023 2024 2025 2026 2027

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## Key Performance Indicators

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### Budget

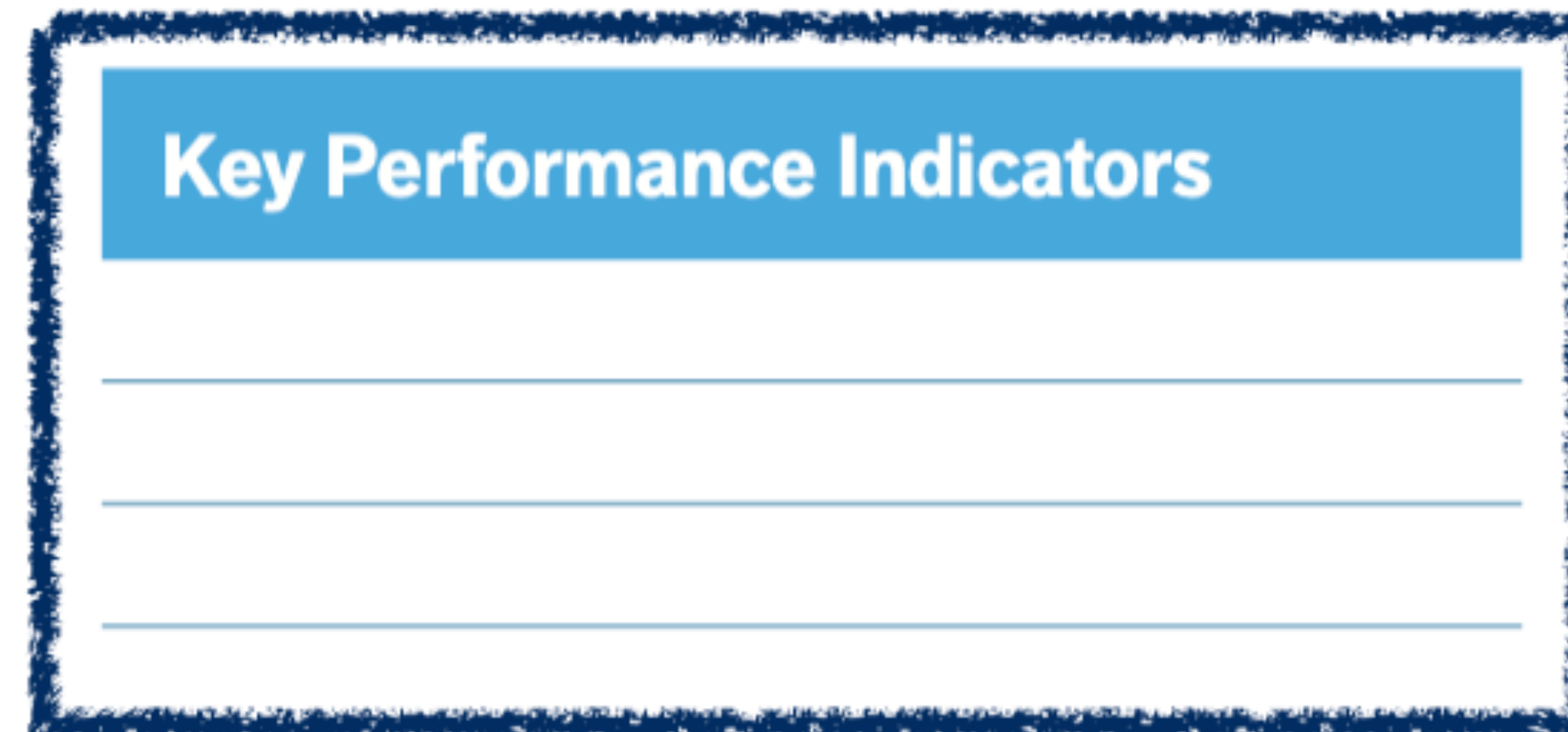
### Responsibility

# Definition - Key Performance Indicators

**Quantitative** - Can be precisely measured with an increase or decrease in a specific metric.

**Qualitative** - Can be measured anecdotally, or through the quality of the outcome.

**Eliminated or Launched Program** - Can be measured by starting or stopping something.



**Key Performance Indicators**

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## Example:

*Commitment: Our students will have the ability and agility to see and make meaning out of information in both a reflective and innovative way.*

## Priority:

- Create a culture where parents and alumni networks understand and engage with the curricular priorities of the school.

**Exercise:** Write one quantitative KPI, one qualitative KPI, and one program start/stop KPI.

# Priority Card #

Commitment Name

What's the Commitment?

Priority

- Critical
- Important
- Desired

What's the Priority?

Action Steps

Timeframe

*Year One*

2023 2024 2025 2026 2027

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*Year Two*

Key Performance Indicators

*Year Three*

*Year Four*

*Year Five*

Budget

Responsibility

Benefit to Stakeholder

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# Responsibility & Team

**Ultimate Oversight** - Head of School.

**Priority Lead** - Who will lead the project, take accountability for progress, and delegate responsibility to others?

**Team Members** - Who else will participate in “doing the work” on an ongoing or periodic basis?

**Board/Board Committee Involvement** - What role, if any, does Board play?

**Volunteers** - Are volunteers needed, if so, whom?



## Example:

*Commitment: Our students will have the ability and agility to see and make meaning out of information in both a reflective and innovative way.*

## Priority:

- Ensure teaching excellence in every classroom and engage faculty in a collaborative structure that supports individual, professional, and institutional growth.

**Exercise:** Assign priority lead, team, Board, and volunteers to this priority for your school.

# Priority Card #

## Commitment Name

## Priority

- Critical
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## Benefit to Stakeholder

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## What's the Commitment?

## What's the Priority?

Action Steps
<i>Year One</i>
<i>Year Two</i>
<i>Year Three</i>
<i>Year Four</i>
<i>Year Five</i>

## Timeframe

2023	2024	2025	2026	2027
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Key Performance Indicators

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Budget

Responsibility



# Annual Action Steps

## Definition

Major accomplishment or milestone, year-by-year, that will ensure the priority is accomplished. This is a tool to help you set expectations and set the pace for the work.

## Example:

*Commitment: Our students will have the ability and agility to see and make meaning out of information in both a reflective and innovative way.*

## Priority:

- Ensure teaching excellence in every classroom and engage faculty in a collaborative structure that supports individual, professional, and institutional growth.

**Exercise:** Work backwards from year-five to year-one to break this into five, one-year steps.

# Priority Card #

## Commitment Name

## Priority

- Critical
- Important
- Desired

## Benefit to Stakeholder

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*Year One*

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## Key Performance Indicators

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### Budget

### Responsibility

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## Key Performance Indicators

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### Budget

### Responsibility

# Budget

**Hard Costs** - Funds that must be budgeted or found.

**Soft Costs** - Non-monetary resources required.

**Opportunity Costs** - What must be forsaken or abandoned?

**In-Kind Opportunities** - What non-monetary opportunities are available?

**Other** - What other financial implications must be considered?



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## Key Performance Indicators

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### Budget

### Responsibility



**Q&A**



**Thank you.**

amplify the good