Strategic Organizational Planning

HERZOG FOUNDATION

ESTABLISHING A 3-YEAR VISION

» Who/What would we be three years from now if we had no restrictions at all?

» What are the major decisions, success stories, and milestones we want to celebrate?

» What limiting beliefs are holding us back?

» What could we do over the next three years? Why?

» What will we commit to do? How?

SESSION 3
DATA ENABLED PLANNING

We will use our timeline maps during this session.
If you would like yours printed, please email
training@herzogfoundation.com

LEARNING OBJECTIVES:
DEBRIEF SO FAR & CHECK-IN

1. Establish an understanding of Strategic Planning - what it is & why it matters
2. Clarify the difference between a strategic organization & a strategic plan
3. Identify barriers to leading a strategic organization
4. Create a framework for the school to create its own strategic plan for growth
5. Receive coaching on the unique situation of your school

DATA SOURCES

“Whoever owns the data owns the floor.”

DATA SOURCES | FINANCIAL

- Income Statement
- Balance Sheet: Assets & Liabilities
- Financial Aid
- Budget Projections (3 scenarios)
- Revenue Sources
- Investments/Endowment

DATA SOURCES | ENROLLMENT & ENGAGEMENT

- Funnel Report: Progression, Inquiries, Tours, Apps, Admitted, Enrolled
- New Family Survey
- Faculty & Families Survey (NPS)
- Enrollment Trend Analysis by grade by teacher (3-5 years)
- Summer Enrollment Trend
- Zip Code Report
- Faculty Family Engagement Assessment

BOARD ENROLLMENT REPORT

DATA SOURCES | ACADEMIC EXCELLENCE

- Teacher Observations & Coaching Feedback
- Student Growth Assessments
- Progression on Scope & Sequence

DATA SOURCES | OPERATIONAL PERFORMANCE

- Facilities Quality Assessment
- Safety & Security Assessment
- Funding & Completion of Maintenance
- IT Quality & Security Assessment

DATA SOURCES | EXTERNAL

- Community Demographic Trends
- Community Economic Projections
- Competitive Analysis

DATA SOURCES

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10-Year Mapping

What historical data stands out for you?