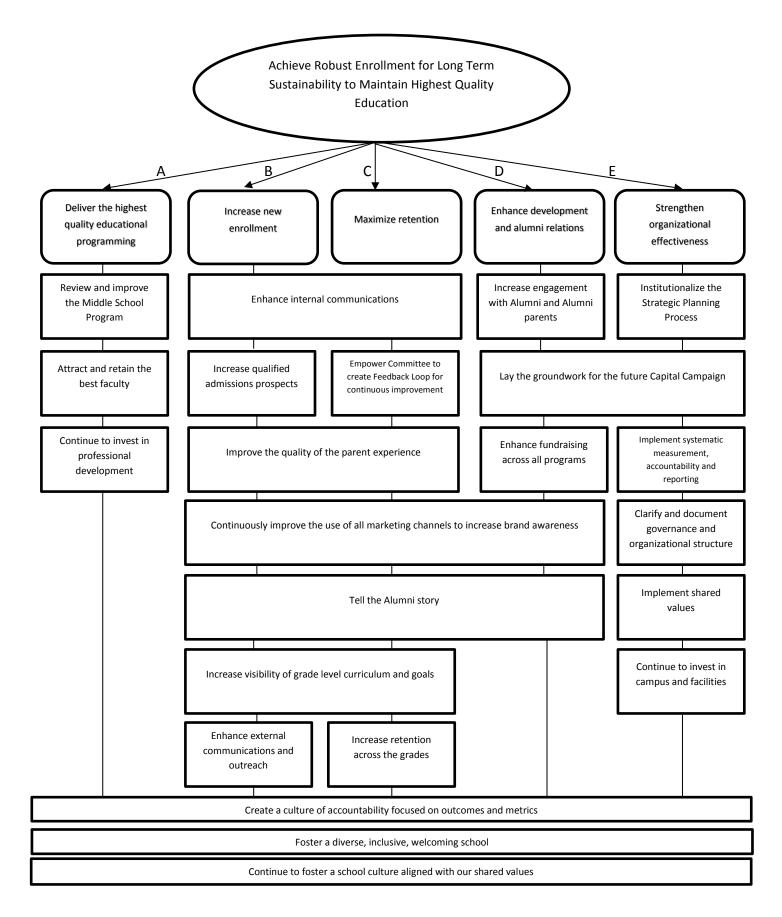# SAMPLE
STRATEGIC PLAN FORMAT

2017-2020

The sample strategic planning format uses a one page Strategic Map format to identify areas of focus for the Plan. From the Strategic Map, a Strategic Plan is created to advance strategic priorities for the coming 1-3 years. The plan accomplishments are reviewed by the Board at the end of each school year. The Board then revises the Strategice Map at its June meeting. Based on the revised Strategic Map, the Strategic Plan is updated for the following school year.

Please note that this sample does not include financial implications. CIS recommends that a comprehensive multi-year planning document include financial implications of each action step.

Sample School

Strategic Map: 2017-2020

Achieve Robust Enrollment for Long Term Sustainability to Maintain Highest Quality Education

A — Deliver the highest quality educational programming

B — Increase new enrollment

C — Maximize retention

D — Enhance development and alumni relations

E — Strengthen organizational effectiveness

A	B	C	D	E
Review and improve the Middle School Program	Enhance internal communications		Increase engagement with Alumni and Alumni parents	Institutionalize the Strategic Planning Process
Attract and retain the best faculty	Increase qualified admissions prospects	Empower Committee to create Feedback Loop for continuous improvement	Lay the groundwork for the future Capital Campaign	
Continue to invest in professional development	Improve the quality of the parent experience		Enhance fundraising across all programs	Implement systematic measurement, accountability and reporting
	Continuously improve the use of all marketing channels to increase brand awareness			Clarify and document governance and organizational structure
	Tell the Alumni story			Implement shared values
	Increase visibility of grade level curriculum and goals			Continue to invest in campus and facilities
	Enhance external communications and outreach	Increase retention across the grades		

Create a culture of accountability focused on outcomes and metrics

Foster a diverse, inclusive, welcoming school

Continue to foster a school culture aligned with our shared values

Sample Strategic Plan Format 2017 - 2020

Strategic Plan				
TRACK A: Review and Improve the Middle School Program				
RESULT	METRICS	KEY STEPS	DEADLINE	ACCOUNTABILITY
Our middle school program is academically rigorous, artistically enriched, socially healthy, and fully prepares students for high school.	Survey of school members reflects their confidence	Survey Review: Retention Committee, MS Task Force, and Teachers review all 2016-17 parent survey findings.	Fall 2017	Committee; Task Force
	High school placement and exam data meet grade level expectations	MS Task Force surveys faculty for input and suggested improvements.	Oct 2017	School Director, MS Task Force
		MS Task Force reviews relevant school literature and other school MS programs to identify opportunities for improvements.	Nov-Feb 2018	School Director, MS Task Force
		MS Task Force reviews high school and middle school programs at area private and public schools to identify opportunities for improvements.	Nov-Feb 2018	School Director, MS Task Force
		Task Force meet with the Board to share findings and recommend next steps.	March 2018	School Director, MS Task Force
		Recommendations are implemented	May 2018	School Director, MS Task Force
Parents have confidence in the middle school program and accurately understand its components and strengths.	Periodic surveys show that the middle school program is highly valued by the school's parents	Annual parent survey of 8th grade parents	Yearly, after graduation	Retention Committee
		GC and Teachers review the 8th grade survey each year	Fall, yearly	School Director
		Retention Committee reviews and recommends revisions to survey content, distribution, and timing as needed.	Feb 2018	Committee
		Create and publish a middle school program guide that clearly and persuasively conveys the distinctive components and benefits of the school's curriculum in grades 6-8.	Nov 2017	Communications Director

TRACK B-C: Improve the Quality of the Parent Experience				
RESULT	METRICS	KEY STEPS	DEADLINE	ACCOUNTABILITY
All administrative and business interactions between parents and the school are personalized, effective, timely, and accurate.	Parents report positive interactions with the school's administration in yearly survey.	Continue to integrate the school's new internet program to improve parents' experience and maximize its effectiveness	Jan 2018	Business Manager
		All faculty and staff strive to respond to parent requests for information within 24 hours	Ongoing	School Director, Chair
All parent/community communication is timely, accurate, friendly, and well designed.	Positive feedback from parents, no complaints	Develop monthly editorial calendars	Ongoing	Communications Director
		Events are publicized at least 2 weeks ahead of time, with reminders across all channels {email, Facebook, Twitter, Instagram).	Ongoing	Communications Director
		Ensure that calendar additions or revisions are posted on the school's website and communicated promptly.	Ongoing	Office Manager
		Investigate text messaging for event reminders	Jan 2018	Communications Director, Business Manager
Parents have a clear understanding of the school's programs, policies and procedures, and who to ask for answers to specific questions	Time spent managing issues or clarifying policies is reduced or eliminated.	Update, re-arrange and distribute Parent Handbook to parents	Sept 5, 2017	Communications Director, School Director
		Revise educational support section of the Parent Handbook, and add to the website, to more clearly outline the school's program.	Sept 5, 2017	School Director, Learning Support Chair, Communications Director
		Add Student Support page to website	Jan 2018	Communications Director
		Ensure that parents are informed how to access key school information and effectively use the school's new internet program	Oct 2017	Business Manager, Admissions Director
		New parent page on school website identifies who parents should speak to when they have specific questions	Done	Communications Director
Baseline expectations are established for teacher-to-parent communication (what parents should know and how often)	Parents rate teacher communication highly in yearly survey.	GC will review parent feedback regarding parent - teacher communication from the 2017 survey	Oct 2017	School Director, Chair
		Identify ways to improve quality and frequency of teacher-parent communication	Jan 2018	School Director, Chair
		Introduce faculty to new internet program module for creating online student reports	Aug 2017	Business Manager, GC
		Identify timeline for establishing an online student report protocol for end-of-year reports	Jan 2018	Governance Council
		Identify a more effective way to review and edit student reports	Feb 2018	Governance Council
		Implement online student reports	June 2018	Governance Council

TRACK BCD: Improve Marketing and Outreach				
RESULT	**METRICS**	**KEY STEPS**	**DEADLINE**	**ACCOUNTABILITY**
New ½-time Marketing and Outreach Director provides increased focus on external marketing	New hire is on board by start of school.	Hire Marketing and Outreach Director	Sept 1, 2017	School Director
		Onboard and train new Marketing and Outreach Director; introduce her/him to the school's program and culture, brand, key differentiators, current messaging, parent surveys, and marketing audit report	Nov-17	School Director, Communications Director
New marketing campaign more effectively differentiates the unique features of the school's educational philosophy, program, and culture :.	Marketing dashboard shows a 3-5% increase in visitors to the school's website year-over-year (fiscal year)	Review recommendations from the spring 2017 marketing audit to integrate into the 2017-18 marketing plan	Sept 2017	Marketing Director
	Marketing dashboard shows increased metrics from social media marketing	Create a marketing plan that makes the best use of the department's budget and staff	Oct 2017	Marketing Director
	2-4% increase in the number of inquiries and applications year-over-year (academic year)	Create "Why this school? Why now?" marketing campaign across channels that highlights the unique features of the school's early childhood program, grades 1-5 program, and middle school program	Jan 2018	Marketing Director
		Integrate aspects of the "Why this school, Why now?" campaign on the school's website	Feb 2018	Communications Director
		Create blog posts that highlight aspects of the school's education and its value for children	Winter 2018	Marketing Director
		Refresh website content	Fall 2017	Communications Director
		Provide monthly admissions funnel report (inquiries, applications, acceptances, and enrollment) with year-over-year data for Directors, Enrollment Comm., and Board	Oct 2017	Admissions Director
		Participate in the regional independent school admissions group, to stay abreast of regional enrollment trends	Ongoing	Admissions Director
The school's Website uses short videos to engage and inform visitors to the website, increasing time spent on page views	Google Analytics shows increased average time on website and views of the videos	Identify resources available to produce videos and budget	Oct 2017	School Director, Marketing Director
		Identify themes, events, or activities that effectively differentiate the school	Winter 2018	School Director, Marketing Director
		Identify a capable and affordable videographer	Winter 2018	Marketing Director
		Plan and execute videos	Spring 2018	Marketing Director
		Post videos on the school's website	Spring 2018	Communications Director
TRACK C 7: Increase Retention in all Programs				
RESULT	**METRICS**	**KEY STEPS**	**DEADLINE**	**ACCOUNTABILITY**
The school's programs are well known and understood by current parents and perceived as academically challenging, arts-integrated, age-appropriate, dynamic, and fostering a love of learning.	Retention rate increases in kindergarten; grades 1-5, and in grades 6-8.	Write, design, and print Elementary and Middle School Program Guides that highlight the distinct features and benefits of the school's education.	Winter 2018	Communications Director
		Expand internal promotion of admissions events	Ongoing	Communications Director
		Create new format for Middle School Preview Event with wider audience and expanded internal promotion across the grades	Jan 2018	Admissions Director, Communications Director, Chair
		Revise website to highlight middle school program	Nov 2017	Communications Director
		Implement clearer procedures for conflict resolution when issues arise with students and parents	Winter 2018	School Director, GC, Chair
		Explore hiring a guidance counselor to support students, parents, and teachers with non-academic issues	Winter 2018	Middle School Task Force, Governance Council
		Establish protocols for increased communication from teachers sharing what is happening in the classroom to make the value of the educational experience more visible	Winter 2018	School Director, Governance Council

TRACK D: Increase Engagement with Alumni and Alumni Parents				
RESULT	**METRICS**	**KEY STEPS**	**DEADLINE**	**ACCOUNTABILITY**
Improve alumni parent and student record keeping	Increased emails for each graduating class	Get updated emails and high school/college names for past 8 years	Ongoing	Development Director
		Work to remove expired email addresses from database	Ongoing	Development Director
		Utilize social media to generate alumni engagement	Ongoing	Development Director
		Refresh alumni web page contents	Winter 2018	Development Director
Grow alumni outreach efforts beyond existing events	Successful event that is well-attended	Create, plan, and budget for new event	Fall 2017	Development Director
		Create targeted invitations specific to each alumni group	Event specific	Development Director
		Identify alumni parents to help support the event	Fall 2017	Development Director
		Use Facebook "events" feature and other social media to generate more engagement in alumni specific events	Event specific	Development Director
		Consider adding a pre or post alumni gathering to events like a speaker or other event	Event specific	Development Director
Create 5-year reunion events for alumni students and parents	A successful event will gather 50%+ of the graduating class	Talk with Class Teacher of the targeted graduated class group to gather information and suggestions	Fall 2017	Development Director
		Identify alumni and parent reps to take lead to create and enroll the event	Fall 2017	Development Director
		Promote alumni and alumni parent events via email and social media	Winter 2018	Development Director
		Collaborate with other schools to host a regional alumni event	Winter 2018	Development Director
New alumni profiles for summer newsletter	Publication each summer with alumni profiles; email distribution to our School Friends list	Identify and contact alumni and create alumni profiles for the summer newsletter, other publications, and the school's website	Spring 2018	Development Director Communications Director
		Solicit faculty articles or interviews	Spring 2018	Communications Director

TRACK E: Institutionalize the Strategic Planning Process				
RESULT	METRICS	KEY STEPS	DEADLINE	ACCOUNTABILITY
School Director and Director's group creates, implements, monitors, and updates the strategic plan and reports to the Board on progress.	Plan is created and shared with school constituents	Directors create plan with input from board members	Aug 2017	School Director
	The strategic plan is integrated into the management activities of the school	Directors discuss progress at weekly meetings and revise as needed	Ongoing	School Director
		School Director shares progress and receives questions and feedback at board meetings	Ongoing	School Director
Strategic planning aligns with the NEASC accreditation process and timeline		Accreditation Committee reviews 2017 strategic plan document	August 2017	Director, Accreditation Coordinator
		Board Officers review 2017 strategic plan document	August/Sept	Director, Board Officers
		Governance Council reviews 2017 strategic plan document	Sept 2017	Director, Governance
		2017-18 strategic plan is submitted to NEASC	Sept 2017	School Director, Accreditation Committee
The School Director updates the Board of Trustees on the strategic plan periodically throughout the year and invites feedback and support in advancing strategic priorities.		Strategic plan draft is reviewed by Board Officers	August/Sept	Director, Board President
		A report of a track of work is scheduled to come to each Board meeting	Ongoing	Director, Board Officers
		School Director provides an end-of-year report of all tracks to the board at the end of each	Mid May, yearly	School Director
		The Board of Trustees reviews and revises the strategic map yearly at its June end-of-year meeting	Summer, yearly	School Director, Board Officers