

Options for HEG's Strategic Planning Services

OPTION 1: FAST-TRACKED STRATEGIC PLAN

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| Purpose | <ul style="list-style-type: none"> Fast, responsive, cost effective, identifies issues from unbiased 3rd party perspective, missing community buy-in and long-term planning | | | | | | |
| Timeframe | <ul style="list-style-type: none"> HEG holds two days of onsite focus groups (plan completed in 3-4 weeks) | | | | | | |
| Participants | <ul style="list-style-type: none"> HEG facilitates two days of on-site focus groups with school stakeholders (e.g., board, parents, staff, students, alumni) Board Steering Committee (BSC) to represent the board in the planning process | | | | | | |
| Methodology HEG Develops Streamlined Strategic Plan | <ul style="list-style-type: none"> HEG supports BSC to prepare planning process, budget, time lines, editing plan, etc. HEG's methodology involves analysis of the school's key performance benchmarks utilizing a four-step approach: <ol style="list-style-type: none"> Facilitate two days of on-site focus groups, interviews, and observations with school stakeholders (e.g., board, parents, staff, students, alumni) Completion of three confidential statistically-based online surveys with school community (e.g., parents, staff, board) Hold one-on-one discussions with your School's Executive Committee Review school background documents and data HEG reviews core <i>values</i> and <i>mission</i> and <i>vision</i> statements HEG assess the school's Internal and External Environment (SWOT's analysis) HEG identifies, prioritizes, and frames critical issues needed for effective change HEG formulates strategic priorities, goals, objectives, and rationale for each goal HEG advises BSC on development of actions plan for each goal/objectives for implementation and presentation to the Board | | | | | | |
| Deliverables | <ul style="list-style-type: none"> Identify critical issues Develop goals and objectives to address issues Two drafts of abridged strategic plan co-edited with BSC | | | | | | |
| At A Glance | Online Surveys | Focus Groups | Retreat | Goals, Objectives, Mission, Vision, Values, Ed. Phil. | Action Plans | Participation Level | |
| | Yes | Yes | No | Yes, but streamlined | No | Board | Community |
| | | | | | | Low | Low |
| Cost | <ul style="list-style-type: none"> TBD | | | | | | |

OPTION 2: STREAMLINED STRATEGIC PLAN

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| Purpose | <ul style="list-style-type: none"> Cost effective, develops purpose/direction, identifies issues and develops proactive strategies, inclusive of community, missing action plans | | | | | | | | | |
| Timeframe | <ul style="list-style-type: none"> 2.5 day retreat (Strategic Plan completed in 6-8 weeks) | | | | | | | | | |
| Participants | <ul style="list-style-type: none"> HEG facilitator Strategic Planning Committee (SPC) composed of school stakeholders (e.g., board, parents, staff, students, alumni) Board Steering Committee (BSC) to represent the board in the planning process | | | | | | | | | |
| Methodology HEG Develops Fast-Tracked Strategic Plan | <ul style="list-style-type: none"> HEG supports BSC to prepare planning process, budget, time lines, Planning Committee make-up, etc. BSC develops background internal/external data for retreat participants HEG's methodology involves analysis of the school's key performance benchmarks utilizing a two-step approach: <ol style="list-style-type: none"> Completion of three confidential statistically-based online surveys with school community (e.g., parents, staff, board) Review school background documents and data HEG facilitates a 2.5 day on-site retreat with the SPC: <ul style="list-style-type: none"> <i>Re/define values, mission and vision statements, and educational philosophy</i> Clarify organizational mandates Assess the school's Internal and External Environments (SWOT's analysis) Identify, prioritize, and frame critical issues needed to effect change to achieve the mission and vision Formulate strategic priorities, goals, objectives, and rationale for each goal HEG advises BSC on development of actions plan for goals/objectives for implementation HEG provides advice to BSC on development of Strategic Planning Document and presentation to the Board | | | | | | | | | |
| Deliverables | <ul style="list-style-type: none"> Mission and Vision Statements Guiding core values Educational philosophy Critical issues Goals, rationale for each goal, and objectives Three drafts of abridged strategic plan co-edited with BSC | | | | | | | | | |
| At A Glance | Online Surveys | Focus Groups | Retreat | Goals, Objectives, Mission, Vision, Values, Ed. Phil. | Action Plans | Participation Level | | | | |
| | Yes | No | Yes | Yes, but streamlined planning document | No | <table border="1"> <tr> <td>Board</td> <td>Community</td> </tr> <tr> <td>High</td> <td>Medium</td> </tr> </table> | Board | Community | High | Medium |
| Board | Community | | | | | | | | | |
| High | Medium | | | | | | | | | |
| Cost | <ul style="list-style-type: none"> TBD | | | | | | | | | |

OPTION 3: COMPREHENSIVE STRATEGIC PLAN

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| Purpose | <ul style="list-style-type: none"> Comprehensive, far-sighted, participative, engaging community, and inclusive of long-term action plans – best approach | | | | | |
| Timeframe | <ul style="list-style-type: none"> 5-7 months | | | | | |
| Participants | <ul style="list-style-type: none"> HEG facilitates two days of on-site focus groups with school stakeholders (e.g., board, parents, staff, students) HEG facilitates two retreats with Strategic Planning Committee (SPC) Board Steering Committee (BSC) to represent the board in the planning process | | | | | |
| Methodology HEG Prepares Complete Strategic Plan | <ul style="list-style-type: none"> HEG works with BSC to determine scope and preparation of planning process, budget, time lines, composure of your SPC, and orientation session(s) with Staff, Board, and/or Parents BSC obtains background internal/external data and constituency views on the school 2-Day of Onsite Focus Group Sessions with parents, students, staff, faculty, board members, and/or other members of your community to identify areas of priority Completion of three confidential statistically-based online surveys with school community (e.g., parents, staff, board) Two Facilitated 2-3 day On-Site Retreats with SPC to re/define values, mission / vision statements, and educational philosophy Re/define mission and vision statements Re/develop guiding core values and educational philosophy Assess school's Internal and External Environment and strengths, weakness, opportunities, and threats (SWOT's); Identify, prioritize, and frame critical issues for change Formulate strategic priorities, goals, and objectives Follow-up with Community Surveys to gather feedback on drafts of the strategic plan Develop detailed Actions Plans for each set of goals / objectives for implementation HEG supports BSC to write the formal Strategic Planning Document and presentation to the Board | | | | | |
| Deliverables | <ul style="list-style-type: none"> Mission and Vision Statements Core values Educational philosophy Goals, objectives, and rationale for each goal Action plans Three drafts of the full strategic planning document co-edited with BSC | | | | | |
| At A Glance | Online Surveys | Focus Groups | Retreats | Goals, Objectives, Mission, Vision, Values, Ed. Phil. | Action Plans | Participation Level |
| | Yes | Yes | Yes | Yes; complete planning document | Yes | Board High |
| | | | | | | Community High |
| Cost | <ul style="list-style-type: none"> TBD (Costs can be adjusted for exclusion of surveys and/or focus groups) | | | | | |