

## OVERVIEW OF HALLADAY EDUCATION GROUP'S STRATEGIC PLANNING PROCESS

Planning need not be tedious, irrelevant, or expensive. On the contrary, it can be a process that arouses interest and support and can be of enormous value to your organization's growth. The ultimate product of planning is the plan – your board's determination of the strategies that will prioritize the decisions of your organization and the annual operational plan -- the blueprint for your school's future. Our process of strategic planning is focused and raises a progression of questions that helps to examine assumptions, gather and incorporate information about the present, and anticipate the environment in which the school will be working in the future, and asks:

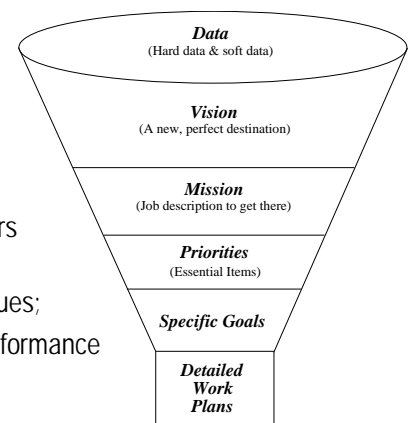
- » Where are you now?
- » Where do you want to be?
- » How do you get there?
- » How do you measure your progress and know you've gotten there?



## VALUE TO YOUR SCHOOL

Many schools spend their time reacting to unexpected changes instead of anticipating and preparing for them. This is called crisis management. As the world's economy shifts, powerful forces are impacting your school, your students, and your staff. Now more than ever, your board needs a comprehensive plan to maximize your school's strengths, foresee your threats, reduce your weaknesses, and take advantage of future opportunities. Organizations caught off guard spend a great deal of time and energy "playing catch up". They use up their energy coping with immediate problems with little energy left to anticipate and prepare for the next challenge. This vicious cycle locks many organizations into a reactive posture. It does not have to be that way. A sensible alternative is our well tested planning process that provides a viable alternative to crisis management. Strategic planning is a step by step process with definite goals and end products that can be implemented and evaluated. Very simply, it is the process by which your school will look into the future, paint a picture of that future based on current events, and influence the forces that will affect you. This will allow you to:

- Gain credibility for your organization amongst donors and identify critical projects for their investment;
- Identify areas of operation needing attention and use it as a springboard to strengthen school performance;
- Identify and reach consensus on critical issues before they become a crisis (e.g., finance, enrollment, marketing, fundraising, human resources, academic programs, facilities);
- Articulate a uniform, shared mission and vision, and provide a clearer focus for the organization, producing more efficiency and effectiveness, and participation and ownership;
- Build trust, respect, team-work, and communication amongst board members and the Head of School;
- Ensure that board members understand their roles, responsibilities, and issues;
- Monitor performance and provide benchmarks from which progress and performance can be measured;



## OUR STRATEGIC PLANNING PROCESS

*The following provides a framework for the process that we utilize in the development of your Strategic Plan:*

1. Determine the scope of your Strategic Planning process and subsequent steps and timelines;

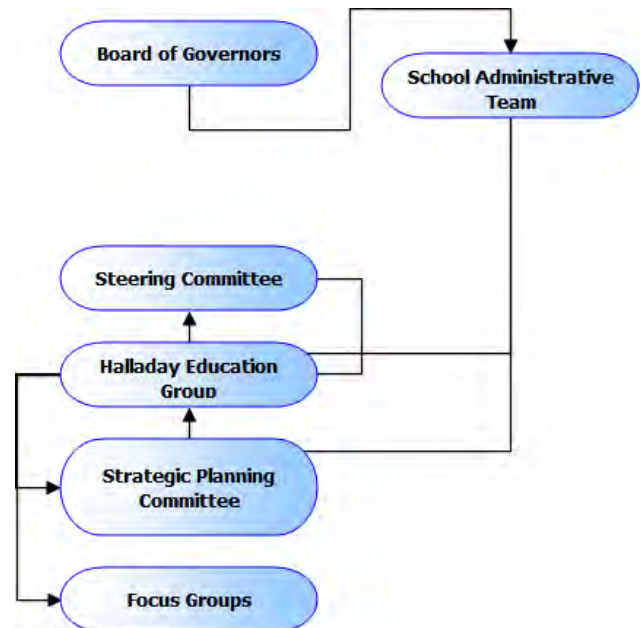
2. Orient the board, administration, faculty, and parents with our planning process;
3. Obtain community views on the school's performance (e.g., interviews, focus groups, online surveys);
4. Assemble internal and external background data to determine where you are now;
5. Re/define the vision, mission, core values, and educational philosophy of where you want to be;
6. Assess your current situation and your strengths, weaknesses, opportunities, and threats (SWOT's);
7. Identify and frame critical issues and priorities for change;
8. Develop strategic goals and objectives for success;
9. Support development of the action plans for improvement;
10. Assist the planning team in presenting the results to your board and community;
11. Assist with the preparation of your internal and public Strategic Planning document(s).



## RESOURCE COMMITMENTS

Doug Halladay would be the project leader for your plan, and typically involves the following groups in the development of your strategic plan. However, this would be customized to your needs

1. **Strategic Planning Steering Committee (SPSC):** Consists of the Senior Administrators and/or Board Members who will provide advice and oversight on the planning process (e.g., process, budget, membership, deliverables, work plan, agenda, communication, present strategic plan to the board for approval, editing).
2. **Strategic Planning Committee (SPC):** Consists of selected representatives of the school's community (e.g., Board, Parents, Staff) who offer assistance with developing the core values and education philosophy, de/refining the vision and mission statements, collecting and reviewing base-line data, assessing internal and external environment, matching strengths and weaknesses to the opportunities and threats (SWOT's), identify critical issues, strategic goals, and objectives.
3. **Focus Groups:** Consist of parents, students, staff, and other stakeholder groups that will be struck as needed to provide feedback on the school's performance and direction, as well as the online surveys.



## SCHEDULE

The details of your work plan can be adjusted to your needs. Typically our planning process is completed within 20-24 weeks. All of the steps can be tailored to your school's needs, payment schedule, and governance milestones. If your school uses our comprehensive planning route, the process normally occurs over three separate 2-3 day onsite sessions. Again, these are customized to your school's unique needs and price point.

*Harbert Hills Academy*

*3575 Lonesome Pine Road*

*Savannah, TN 38372*

*731-925-3098 Fax: 731-925-4238*

**January 13, 2009**

**To Whom It May Concern:**

**Harbert Hills Academy retained Doug Halladay, of Halladay Education Group, to assist us with developing a five year strategic plan.**

**Mr. Halladay met on site with us on three different occasions over a period of four months. During these sessions Mr. Halladay led us through the process of determining where we were and where we wanted to be and then assisted us with developing appropriate goals, objectives, and action plans.**

**The timelines developed in the beginning of the process have been met in each case. Mr. Halladay's experience and expertise have been invaluable in helping us to complete our Strategic Plan. He was sensitive to our unique philosophy and needs and worked well with our diverse constituency.**

**I highly recommend Mr. Halladay and his firm Halladay Education Group.**

**Sincerely,**



**Stephen L. Dickman  
President**





# VIS - Greybrook Academy

*Servicio antes de mi mismo. Apprendre avant tout.  
Service before self. Learning above all.*

April 23, 2008

To Whom it May Concern:

Re: Halladay Education Group Strategic Plan Services

Mr. Doug Halladay has recently completed a contract as consultant leading Greybrook Academy through the research for and writing of a five-year Strategic Plan. The entire process extended over approximately nine months, from the proposal to sign-off by the Head of School and Advisory Council.

Over the course of the nine months, Mr. Halladay met individually and in group settings with members of the administrative team and members of the Council; he facilitated several focus group sessions with representative members of the parent body, the staff, and the students of Greybrook; and he wrote, collected, and compiled a survey to give all Greybrook parents a voice in the construction of the plan. Once the data was collected, Mr. Halladay wrote and revised several drafts of the Strategic Plan, responding to the feedback of the Steering Committee.

While Greybrook's finished Strategic Plan contained nothing unexpected or particularly challenging, this is most likely a reflection of the school itself – its self-awareness as an organization and its constant efforts at self-improvement.

Throughout the development of the Plan, Mr. Halladay was consistently professional in his dealings with staff and parents. He established a respectful relationship with the parent members of the focus groups and the Planning Committee, and ensured that each stakeholder group felt their comments were heard. He is also very organized and punctual, and consistently delivered data and drafts according to the established schedule. Other of Mr. Halladay's strengths lie in delegating and drawing on the abilities and skill sets of the people in the organization, both of which result in the content of the Plan coming authentically from the participants.

Mr. Halladay is clearly well-versed in the process of Strategic Plan development, and is very able to lead such a project for a variety of organizations.

Signed,



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Dr. Leo P. Corriveau, Superintendent of Schools  
Jenifer Krook, Director of Financial Services  
Maria Dreyer, Director of Student Support Services

September 15, 2009

To Whom It May Concern:

It is my distinct honor to be able to recommend Douglas Halladay from the Halladay Education Group to you for your consulting needs. I am a superintendent of schools and a former university administrator from New Hampshire.

Doug facilitated our strategic planning session last July at the Wentworth-by-The Sea Hotel in Newcastle, New Hampshire. He managed to bring us to a completed draft document for our full board's approval in just three days of intense but exhilarating work. His knowledge of schools, curriculum, staffing, financing, communications, and the overall improvement process earned everyone's respect and admiration on day one. His sense of humor was just right in all social settings. He was flexible in meeting our needs and demands, often skillfully shifting gears to keep us on task and productive. Doug also joined us at dinner time much to the delight of twenty school and community participants.

I strongly encourage you to discuss your planning needs with Douglas Hallady, if you want a powerful strategic plan for your school.

Please call if you have any questions.

Best wishes for much success with your planning efforts.

Sincerely,

Leo P. Corriveau, Ph.D.  
Superintendent of Schools