

Strategic Plan Presentation

September 20, 2017



Planning Committee

- Jennifer Cassidy
- Greg Chamberlain
- Josh Killian
- Veena Lakkundi
- Teri McCloughan
- Brandi Olson, Facilitator
- Michelle Ponsolle, Staff
- Tim Benz, Staff



Process and Goals

- Discovery + alignment audit of mission + strategic priorities
- Agile strategy (not traditional)
 - Iterative
 - Adaptable
 - Responsive w/o losing sight of LT impact
- Develop measurable action plan
- Cultivate strategic focus and awareness across MISF
- Build the capacity of MISF team to make and manage action commitments
- Develop the tools and practices that will allow MISF to dynamically adapt to emerging priorities



Stakeholder engagement

- June 8 - gathered a group of our stakeholders
 - Rosa Miller (Board Emeritus)
 - Jennifer Cassidy, Greg Chamberlain, Veena Lakkundi (Board members)
 - Steve Hoepfner, Schulze Family Foundation (funder)
 - Meg Nodzon, GHR Foundation (partner/funding prospect)
 - Tonya Scott, Heritage Christian Academy (member)
 - Sean Martens (Assoc. member, LCMS)
 - MISF staff
- June 20 – online surveys sent to all private and independent schools in MN
 - 53/155 members responded – 34.1%





Impact Playbook

Includes:

Agile strategy overview

Mission

Theory of Change (We believe)

Leadership Engagement Journey

Impact Maps

our strategy story

In June 2017 we gathered a group of our stakeholders—school leaders, community partners, families, board members, donors, and staff to get clear on how MISF is making an impact and creating change.

We worked with Brandi Olson Consulting to create a strategic playbook that describes our enduring mission, theory of change, outcomes, and the engagement journeys of our stakeholders.

Our playbook is a collection of tools that we will use to guide the way we engage with our stakeholders, prioritize our actions and resources, and measure our progress so that we can be agile and impact-driven in everything we do.

Mission

MISF connects and strengthens Minnesota's independent schools through exceptional training, resources, and advocacy so they can be student-centered and mission-driven.

We believe

When every independent school is connected and strong, Minnesota's families will be able to select the school that best fits their children, and Minnesota's students will excel.

Our communities are facing rapid change, and we need agile young people who are prepared to solve complex challenges and embrace new opportunities—this will only happen if all students have the opportunity to attend the school that is the best fit for them.

We connect school leaders to each other and build their capacity through access to critical resources so that they are able to lead schools that thrive and meet the needs of their students, families, and staff.

We create meaningful professional development opportunities for staff and teachers to learn from each other and develop new skills so that they are equipped to build exceptional schools and deliver high quality education for all students.

We advocate with a focused and united voice so that local and state policy makers will understand and support policies and practices that strengthen Minnesota's independent schools.

Connected and strengthened independent schools

Agile

Student-centered

Mission-driven

Impact-driven

Equitable

Networked

Resourced

Accountable

MISF | School Leader Engagement Journey

Leadership

I'll take a leadership role in making the mission happen"

Ownership

"I'll take responsibility to get work done, You can count on me"

Committed

"I'm committed to MISF every year"

Member

"I'll join MISF this year"

Attention

"I care enough about your work to let you communicate directly with me"

Awareness

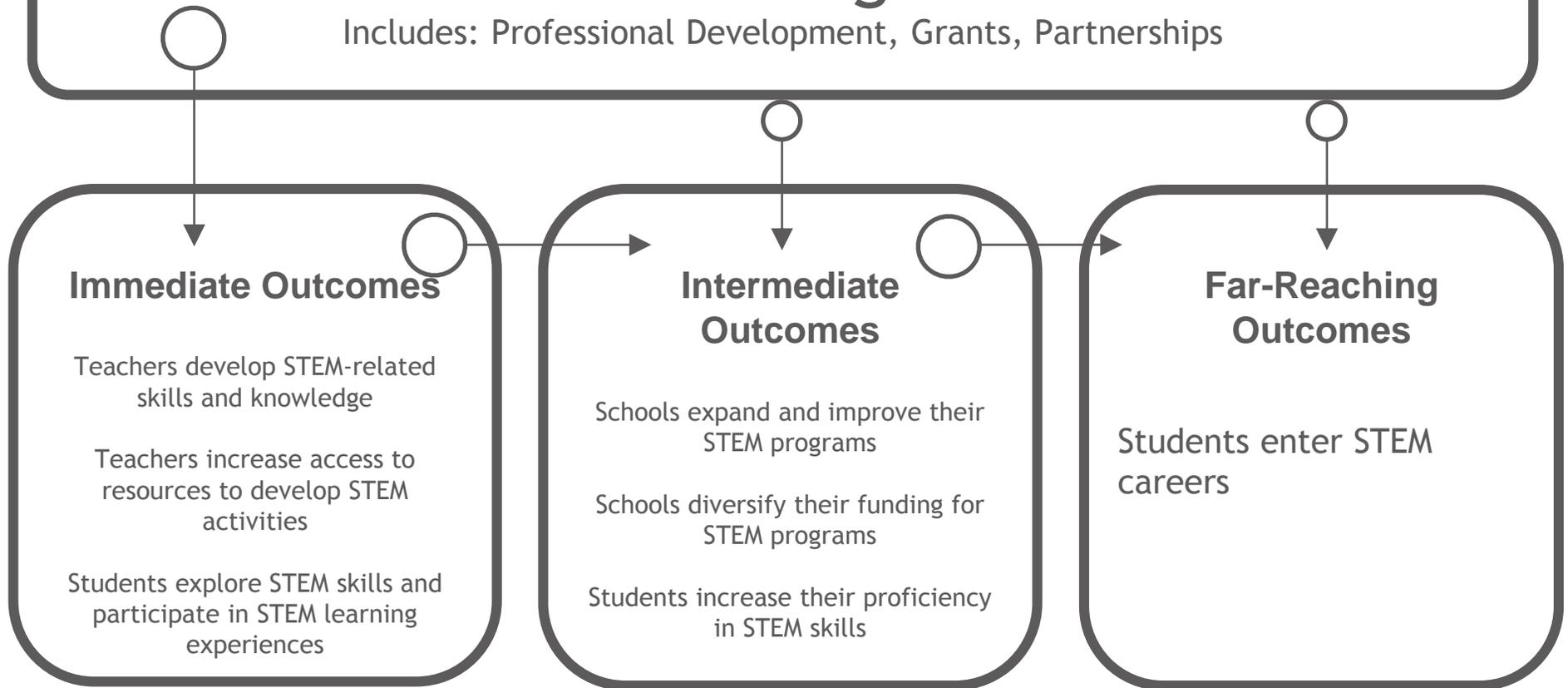
"I am aware that you exist and know what your cause is"

MISF | School Leader Engagement Journey

	MISF Action	Engagement Goal	Mindsets + Behaviors	The IMPACT is... (Why it matters)
Awareness	Building general awareness, through email campaigns, targeted outreach	Brand recognition, read newsletters	"I've heard of MISF and I know we could be members"	Recognize that "I'm not alone"
Attention	Get to know key decision-makers, market trainings and events	Respond to outreach, attend a training or event	"I'll read the newsletter or attend an event"	Increase knowledge of resources, make connections, identify gaps
Membership	1:1 conversations	Increase the usage rate for each organization	"I'll invest resources in membership"	Increase job performance. Create opportunities for staff.
Commitment	Leadership retreat, 1:1 follow-up to make sure members are getting maximum value	Decision-makers reach out to MISF, increasing usage rate, high satisfaction	"I can measure the value of MISF membership"	Develop leadership capacity. Improve results for families.
Ownership	Targeted support to make the case for MISF, recruitment for advocacy work	Participate in advocacy efforts	"We are part of something bigger and I'll invest more energy"	Local and state policies to better support school choice options.
Leadership	Cultivating ambassadors and champions of the work	Participation in committees, board, leadership in advocacy	"I need MISF to thrive. I'll be an ambassador."	MISF and its member schools are strong and connected

STEM Program

Includes: Professional Development, Grants, Partnerships



IMPACT INDICATORS

MISF Agile Strategic Roadmap

Long-term Strategy

12-18 Month Priorities

Impact Playbook

Theory of Change
Engagement Journey
Impact Maps

Connecting + strengthening
Minnesota's independent schools

100 % member retention in 2018

Why: Retention is an indicator that members are engaged and get real value from MISF, and the goal of 100% retention pushes us to ambitious objectives that achieve our long-term strategy.

DEEPEN MEMBER ENGAGEMENT

EXPAND STEM

INCREASE FINANCIAL SUSTAINABILITY

IMPROVE OPERATIONAL EFFECTIVENESS

Increase personal engagement with high-priority members

Increase leadership activities of advisory committee members

Increase funding for STEM grants

Measure our progress and pivot when needed

Launch 1st-year member engagement cycle

Launch pilot STEM learning community of practice

Increase board involvement in fundraising

Evaluate + adapt funding model and organizational structure

Make MISF debt-free

Team level OKRS

Drive priority objectives on a quarterly cycle

Member Engagement OKRs

<p>Big Goal (12-18 months)</p>	<p>100 % member retention in 2018 Why: Retention is an indicator that members are engaged and get real value from MISF, and the goal of 100% retention pushes us to ambitious objectives that achieve our long-term strategy.</p>	
<p>Roadmap Objectives Inspiring + actionable</p>	<p>Increase personal engagement with high-priority members</p>	<p>Launch a 1st year member engagement cycle</p>
<p>Key Results Ambitious, outcome-driven, + measurable</p>	<p>By July 1, 2018 all high-priority* school leaders have a 1:1 connection with MISF</p>	<p>New members will have minimum of 2 actions in Year 1 through MISF offerings or resources</p>
<p>Quarterly OKRS Actionable + Measurable</p>	<p>By end of December 2017</p> <ol style="list-style-type: none"> 1. Create high-priority school list 2. 1:1 visits with 20 highest-priority school leaders 3. Develop engagement action with leader + track follow-through 	<p>By end of December 2017</p> <ol style="list-style-type: none"> 1. Develop individualized engagement plan 2. New members participate in at least one action 3. Map out engagement cycle including critical actions, opportunities, and communication strategy

***High-priority schools meet 1 or more of the following criteria**

- A. Large and/or influential school
- B. Engaged in less than two actions in previous year
- C. School leadership change
- D. No in-person engagements in previous year

STEM OKRs

<p>Big Goal (12-18 months)</p>	<p>100 % member retention in 2018</p> <p>Why: Retention is an indicator that members are engaged and get real value from MISF, and the goal of 100% retention pushes us to ambitious objectives that achieve our long-term strategy.</p>	
<p>Roadmap Objectives Inspiring + actionable</p>	<p>Increase leadership activities of advisory committee members</p>	<p>Launch pilot STEM learning community of practice</p>
<p>Key Results Ambitious, outcome-driven, + measurable</p>	<p>Advisory Committee members will initiate and own 3 new external assets</p>	<p>1/3 of STEM grantees will participate in in pilot learning community of practice</p>
<p>Quarterly OKRS Actionable + Measurable</p>	<p><i>Not prioritized for 2017</i> <i>Action OKRs will be developed when this outcome is "up next" in the roadmap priorities</i></p>	<p>By end of December 2017</p> <ol style="list-style-type: none"> 1. Craft strategy + implementation plan for pilot learning community to launch Jan-March 2018 <ol style="list-style-type: none"> a. Develop impact map b. Define success metrics c. Design learning format d. Set budget 2. Recruit participants 3. Plan Lunch 'n Learn webinar

Financial Sustainability OKRs

<p>Big Goal (12-18 months)</p>	<p>100 % member retention in 2018</p> <p>Why: Retention is an indicator that members are engaged and get real value from MISF, and the goal of 100% retention pushes us to ambitious objectives that achieve our long-term strategy.</p>		
<p>Roadmap Objectives Inspiring + actionable</p>	<p>Increase funding for STEM grants</p>	<p>Increase board involvement in fundraising</p>	<p>Make MISF debt free</p>
<p>Key Results Ambitious, outcome-driven, + measurable</p>	<p>Broaden support of STEM program by adding one new STEM sponsor (\$10,000+)</p>	<p>Each board member will recruit 1 new funding prospect</p>	<p>Retire debt by 12/31/18</p>
<p>Quarterly OKRS Actionable + Measurable</p>	<p><i>Not prioritized for 2017 Action OKRs will be developed when this outcome is "up next" in the roadmap priorities</i></p>	<p><i>Not prioritized for 2017 Action OKRs will be developed when this outcome is "up next" in the roadmap priorities</i></p>	<p><i>Not prioritized for 2017 Action OKRs will be developed when this outcome is "up next" in the roadmap priorities</i></p>

Operational Effectiveness OKRs

<p>Big Goal (12-18 months)</p>	<p>100 % member retention in 2018</p> <p>Why: Retention is an indicator that members are engaged and get real value from MISF, and the goal of 100% retention pushes us to ambitious objectives that achieve our long-term strategy.</p>	
<p>Roadmap Objectives Inspiring + actionable</p>	<p>Measure our progress and pivot when needed</p>	<p>Evaluate + adapt funding model and organizational structure</p>
<p>Key Results Ambitious, outcome-driven, + measurable</p>	<p>Staff will measure progress toward priority outcomes in the roadmap on a monthly basis and adapt quarterly OKR as needed to meet goals</p>	<p>Align business model and organizational structure to the playbook and agile operational priorities</p>
<p>Quarterly OKRS Actionable + Measurable</p>	<p>By the end of December 2017</p> <ol style="list-style-type: none"> 1. Develop progress board to track quarterly objectives and tasks 2. Develop tracking method to evaluate effectiveness 3. Evaluate priorities and craft quarterly OKRs for Jan-March 2018 	<p><i>Not prioritized for 2017</i> <i>Action OKRs will be developed when this outcome is "up next" in the roadmap priorities</i></p>

GOAL: 100 % member retention in 2018

Action Plan (12-18 months)

Do next	In progress	Done
<p>2 Increase personal engagement with high-priority members</p> <ul style="list-style-type: none">• Create high-priority school list• 1:1 visits with 20 highest-priority school leaders• Develop engagement action with leader + track follow-through <p>3 Launch a 1st year member engagement cycle</p> <ul style="list-style-type: none">• Develop individualized engagement plan• New members participate in at least one action by 12/31/17• Map out engagement cycle including critical actions, opportunities, and communication strategy <p>4 Launch pilot STEM learning community of practice</p> <ul style="list-style-type: none">• Craft strategy + implementation plan for pilot learning community to launch Jan-March 2018• Recruit participants• Plan Lunch 'n Learn webinar <p>5 Increase board involvement in fundraising</p> <p>6 Increase leadership activities of advisory committee members</p> <p>7 Increase funding for STEM grants</p> <p>8 Evaluate + adapt funding model and organizational structure</p> <p>9 Make MISF debt free</p>	<p>1 Measure our progress and pivot when needed</p> <ul style="list-style-type: none">• Develop progress board to track quarterly objectives and tasks• Develop tracking method to evaluate effectiveness• Evaluate priorities and craft quarterly OKRs for Jan-March 2018	

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