

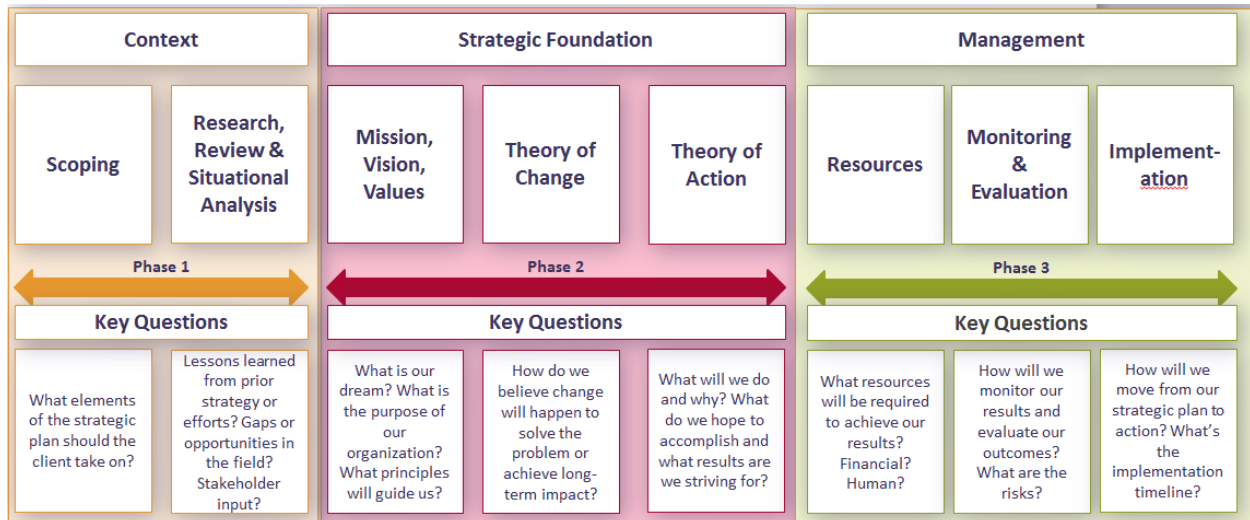


## Education First's Approach to Strategic Planning

In any strategic planning project, our task is to help the organization leaders and staff develop a blueprint that will guide their organization for several years. The organization's ideas, values and activities must be knit together into a coherent strategy. We help by guiding the organization through a systematic process of addressing fundamental questions and meaningfully engaging key stakeholders.

### Phases, Steps and Key Questions for Organizational Strategic Planning

No two strategic planning engagements are alike because all organizations are different. The landscape organizations operate in is constantly changing. And needs vary depending on an organization's maturity. Still, successful strategic planning processes share basic features. This graphic illustrates the phases, steps and key questions that guide Education First's approach to strategic planning.



This methodology is *not* a cookie-cutter or plug-and-play template. We tailor the methodology in every engagement as we apply these ideas to your organization's unique needs and circumstances. Your planning process might be a *start-up* (creating an organization from scratch), a *strategic refresh* (revisiting, either in whole or in part, an organization's strategic foundation and/or management) or a *scale-up* (planning for growth or expansion of an existing organization). Or you might need counsel for a specific program rather than an entire organization. In each engagement, the steps in the graphic above are guideposts and prompts, rather than a to-do checklist.

### Scoping Your Strategy Project

We work collaboratively to determine your organization's needs and identify the key questions the project must address. For example:

- Why does the organization think it needs to engage in strategic or business planning?
- Who is the target audience for the plan (e.g., the board, leadership team, staff, funders, et al)? What is the organization ready for? Who needs to be engaged in the planning process?
- Is the organization currently using some type of strategic plan? How will this effort build on that plan and/or prior efforts?

- How does the organization propose to use the new strategy? How will it help guide, change or strengthen the organization (or specific aspects of the organization)?

### **Moving From Scoping to Strategy**

In our experience, strategy needs vary based on organizations' maturity: whether the organizations are brand-new or early start-ups, whether organizations are maturing and seek to refine their strategy and/or growth plans, or whether organizations have demonstrated success and want to scale up particular initiatives or replicate organizations to achieve major impact.

#### ***Start-up***

A start-up strategic planning process usually involves our entire methodology and is most appropriate for brand-new organizations or young organizations that haven't operated from a strategic plan. We help the organization's founders determine:

- What change does the organization want to see in the world (vision) and how will it contribute to accomplishing that change (mission)? What is the organization's theory of change about how to improve public education? What is its theory of action for its own goals, outcomes and strategies?
- Who needs to lead the organization's initial vision- and mission-setting? What mix of people and which people should form the founding board of directors? What characteristics do we seek in the founding president/executive director? What are the roles of other stakeholders?
- What key organizational and programmatic decisions will be made before a board is recruited and staff are hired, and which will be reserved for the new board and/or staff?
- What is the strategy to secure financial support (e.g., private philanthropic resources, fee-for-service dollars, public funding or some combination)? Who are likely funders and customers?
- What incubation steps do we need to help with (for example, hiring an executive search firm, filing for legal incorporation and federal tax-exempt status, finding a fiscal agent or setting up the books)?

#### ***Strategy Refresh***

A strategic planning refresh may involve a more targeted review in lieu of an overhaul of an organization's current focus or approach. With an organization that wants to ensure that its strategic plan is still relevant or that the organization is still prioritizing the right strategies in a competitive market, we may simply confirm that its vision and mission still reflect what it hopes to accomplish and then double down on refreshing the theory of action: updating the specific elements based on a changed context, setting new multi-year outcomes, refreshing organizational management of financial and human resources and/or developing or refreshing plans to monitor results. We work with leaders to consider these questions:

- Why does the organization need a strategic planning refresh? Has there been a change in leadership? Who is the target audience for the refresh?
- What has changed in the organization's landscape and the overall education landscape and how does that affect the organization's theory of action?
- Has the organization been on track to meet its current goals and outcomes? What has worked and what hasn't? What new strategies, activities and outcomes might be needed?
- What resource, evaluation and implementation needs does the organization need to address?

#### ***Scale-Up***

A growth or expansion strategy requires focus expanding an existing and successful program. A growth strategy begins with articulating the rationale for expansion and then lays out the path to scale. Helping organizations figure out whether and how to expand certain school models, programs and initiatives, or their overall capacity involves asking:

- Is there an unmet need or demand for growth? What is the competitive landscape for expansion?
- Has the organization's theory of change or the theory of action evolved? Should it?
- What capacity is required to support expansion? How will the organization manage and implement this growth?
- What revenue is needed to support expansion? What are the sources of this revenue?