



Dynamic Strategic Planning

Henry Vanderveen – Superintendent
Langley Christian School, Langley, BC

Summary

Langley Christian School is a well-established Pre-K to 12 school with 1000 students located in Langley, BC. Although each of the facilities are near-new, the school has a significant debt. The LCS Board chose to address the debt issue within the context of a comprehensive strategic plan. The over-all goal of this project was to create a Dynamic Strategic Framework and in this year begin the first phase of the project, which was to implement new initiatives to address current concerns and gather data to develop future goals.

Goals for First Phase

- ❖ Develop new strategies to grow the school's Foundation
- ❖ Conduct surveys for Parents, High School Students, Alumni and Educational Staff
- ❖ Develop a new event for Parents of Alumni

Results

The first step in this journey was to create a document which provided a framework for all future development at the school. The school recently went through the process of re-writing mission and vision statements and affirming core values. All planning flows from the mission and all initiatives can be traced back to the mission. Several phases for the project were identified and, in addition to creating the overall plan, we implemented initiatives to meet the goals listed above in the latter half of the school year. In February, 2012, the LCS Foundation held a new seminar, In March we conducted a comprehensive survey, and in May we held a new Honorary Parent Dinner.

- a. The new Foundation Seminar was very encouraging. Approximately 100 respondents attended to get practical advice on personal budgeting, credit management, and investments from a financial professional. The Foundation Board also had an opportunity to speak about wills and estate planning. People appreciated the practical advice and came away with a deeper awareness of the LCS Foundation
- b. Compiling surveys for each demographic in the school and analyzing the data was far more involved than we first thought. We discovered that questions need to be formulated very carefully if they are going to provide the information needed. Analyzing the data is a time- intensive endeavor. In our parent survey alone, we received 200 responses from a total possible of 480. At this writing the Strategic Planning Team is still compiling data and will be developing additional long and short term goals in the Fall.
- c. The new Honorary Parent dinner was a blessing for the 80 people who attended, but we were hoping for twice that number. Stories and testimonies from those who have journeyed with LCS for many years were priceless. Our challenge for next year is to increase the number of attendees, thereby building our donor database.



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Focus of the Project

A framework for developing a comprehensive, dynamic strategic plan for the school was developed by the superintendent with some assistance from Don Distelberg, a Van Lunen consultant, and subsequently approved by the Langley Christian School (LCS) Board in the Fall of 2011. A team, the Strategic Planning Team (SPT or ‘the Team’) made up of three Board members and the superintendent were mandated to work through the framework to assess current and future needs, set goals appropriately and develop a structure whereby the school will always be involved in a strategic planning process of some sort.

All aspects of Langley Christian School are to be addressed in this framework and all stakeholders will play a role in terms identifying areas of focus, developing goals and implementing strategies to meet those goals. Over-arching objectives include sustainability, improvement and growth in each of these broad areas; Educational Program and Delivery, Development; including donor development and fund-raising and Business; including budgeting and long-term debt management and retirement.

Since developing the strategic plan is a complex, multi-year endeavor, several phases of the project have been identified and the focus of this report is referred to as Phase 1. Early in the process the Team ascertained that the school’s most pressing current need is to address the school’s accumulated debt. A decision was made to develop a multi-year structure for the whole strategic plan, but at the same to implement initiatives to address fund raising specifically as a part of the first phase.

Goals for Phase One of the project:

1. Examine efforts of the newly-formed LCS Foundation to increase the size of the school’s endowment. Develop and implement one initiative in the 2011-2012 school year to address this.
2. Examine current fund-raising strategies to determine their effectiveness and either replace or add another fund-raising initiative.
3. Initiate the information gathering phase of the strategic plan. Develop survey instruments for LCS parents, High School students, Alumni as well as Educational Staff, conduct those surveys, analyze the data and begin the goal setting process.

Process

The first goal of the project was to create the blueprint for the entire project. The superintendent developed the Strategic Planning Framework, which was approved by the Board. A Strategic Planning Team is mandated to use that framework as a guide to work through the entire project. To accomplish all of the goals set out below, the SPT is scheduled to meet monthly and the superintendent will spend a minimum of 10 hours a week. Other educational and operational personnel will be asked to participate as needed.

1. The *fund-raising* aspect of the project was identified as an area of priority and a number of possibilities were discussed. The SPT came to these conclusions for the current year:
 - a. Since long-term plans were already in place for our current fund-raising projects, those events will take place as planned for the 2011-2012 and 2012-2013 school years. Those events are:
 - a golf tournament in September- target audience: parents, friends and corporations. Contribution goal \$20,000
 - a dinner and auction in November- target audience: parents, friends and grandparents. Contribution goal \$35,000
 - a Spring Festival in May- target audience- school community families and local community. Contribution goal \$13,000.
 - b. Six years ago, before our new Elementary Campus was built, we held a capital campaign and were successful in raising \$1.1 million. There was some discussion around the possibility of conducting another capital campaign, but the Team decided against doing that again in the near future because we do not currently have any major capital developments underway and it would, in essence, be a debt drive.
 - c. Another fund-raising strategy the school has had in place for the last 5 years is an Annual Fund Campaign. This campaign has been marginally successful in the past and the Team decided to put more effort into donor solicitation to enhance this fund in the current year. The target audience for this is current parents and long-time donors. Last year this fund-raiser brought in \$60,000. Traditionally all of the proceeds of the Annual Fund have been divided up among Information Technology enhancements, Educational Program Enhancement and Capital Improvements. This year we decided to drop the Capital Improvement allocation and replace it with a Debt Reduction component. We produced some new materials to promote the Annual Fund in our mail solicitation strategy.
 - d. It came to the Team's attention that the LCS Foundation has not grown substantially during the last two years. The Foundation is seen as a long-term "fund-raiser." The Foundation's emphasis is on estate planning and planned giving strategies. To raise the profile of the group, last year the Foundation sponsored a seminar on wills and estate planning. The Team made a decision to hold a very practical seminar for parents and staff covering many more aspects of personal finances. We solicited the services of a Christian financial advisor to lead a seminar on personal budgeting, the use of credit cards, debt management, and retirement planning. We also designed and produced a new brochure explaining the work of the Foundation.

- e. Although all current fund-raising efforts were continued this past year, we made a decision to hold an additional event. This dinner was not actually designed to be a fund-raiser, but was meant to re-connect and maintain connection with parents whose children had all graduated from LCS. This is a free dinner and the primary activity in the evening is an opportunity for parents and others to share stories of their children's and their own experiences at LCS.
2. The other major thrust of the project is to ***gather information*** for the SPT in terms of developing future initiatives. At the school's Fall AGM, the superintendent introduced the strategic plan to the Society and asked for input in terms of questions to ask in a parent survey. Later in the year the entire LCS educational staff was asked for their input into the plan. Input was also solicited from Alumni and current High School students.
 - a. Possible questions to ask in a parent survey were received until February, 2012. With that information and samples of surveys conducted at four other schools, the superintendent created a list of questions designed to provide a picture of satisfaction levels of the current program and input into the future direction of the school. Survey Monkey was used to distribute the survey.
 - b. The SPT analyzed the data in several meetings throughout the Spring. The superintendent presented major findings of the survey to the Society in May, 2012.
 - c. In March, 2012 the entire educational staff spent a day focusing specifically on future possibilities. In small, multi-discipline, cross-campus groups and in a large group session the teachers and educational support staff examined current issues with the school's educational program and answered this question, "If there were no financial or other constraints, what would you do to shape LCS in the next few years?" Data from that day were collected and collated, but not yet analyzed.
 - d. In May, 2012 surveys were constructed and conducted for both Alumni and current High School students. LCS' first graduation class was in 1999, so the school has a relatively small alumni group, but we did have a good response to our survey request. Data from those surveys are still to be analyzed.

Results

1. *Fund Raising Initiatives*

- d. Current strategies exceeded contribution goals overall. The Golf Tournament brought in a record amount, but Spring Festival results were lower than previous years. Moving the dinner and auction to a new venue and using a different format brought new life to the event.
- e. As mentioned, there is no capital campaign currently on the horizon, but the SPT will re-assess results of all of our fund-raising strategies in June of 2013 and determine if a capital campaign should be part of our strategic plan.
- f. Annual Fund contributions exceeded last year's total by \$20,000, due in part to the new strategy of personal donor solicitation. When combined with other donations, we were able to pay down \$70,000 more debt than last year. God is Good!!

- g. The new Foundation Seminar was very encouraging. Approximately 100 respondents attended to get practical advice on personal budgeting, credit management, and investments from a financial professional. The Foundation Board also had an opportunity to speak about wills and estate planning. People appreciated the practical advice and came away with a deeper awareness of the LCS Foundation.
 - h. The new Honorary Parent dinner was a blessing for the 80 people who attended, but we were hoping for twice that number. Stories and testimonies from those who have journeyed with LCS for many years were priceless. The overwhelming response from attendees was that this was a good start and needs to be continued. We are planning to do this again next year earlier in the year to avoid conflicts with May/June activities. Our challenge for next year is to increase the number of attendees, thereby building our donor database. We did not plan to have this event contribute to our fund-raising targets this year. However, several gifts were received later as a direct result of the holding the dinner.
2. ***Data Collection for the Strategic Plan-*** In our parent survey, we received 200 responses from a total possible of 480. We regard this as a tremendous response and the data is very significant. The survey was overwhelmingly positive and very encouraging for us. Our Educational Program overall received a 95% approval rating and parents have a great deal of trust in the LCS Board and administration. Some specific program areas and some of the questions on climate and culture received slightly lower ratings and there is some nervousness about the school's long term debt. Much of what the SPT is learning from the parent survey is valuable for future years, but some of what we found can be acted on in the Fall of 2012.

We also received an overwhelming amount of data from the teacher survey. To this point the information has been organized, and SPT has reviewed the results, but much more work needs to be done in terms of prioritizing the ideas before setting goals for them. The school's Educational Leadership Team and the Curriculum Admin Team will be developing strategic goals for enhancing existing programs and possible new program offerings.

We were hoping for more completed surveys from both alumni and current high school students than we received, but we are able to glean some trends from these data.

Spurred on by survey results we have identified the following areas as requiring attention early in the 2012-2013 school year:

- a. Initiate a strategy to develop a system wide anti-bullying program
- b. Develop a comprehensive communications strategy.
- c. Strike an Information Technology Task Force to assess the current infrastructure as it relates to program delivery and develop a three-year plan

that addresses optimal integration of curriculum into appropriate digital technologies.

Conclusions

I am grateful for having had the opportunity to participate in the Van Lunen Fellowship for reasons that go far beyond this project, but the project itself has helped me, and by extension, the school, to learn some valuable lessons with regard to the strategic planning process and some valuable information about parents, teachers, alumni, students and supporters in the LCS community. I will highlight two of these;

Strategic Planning is a complex endeavor! Early in the process I was naïve enough to think that we could possibly have a complete working plan in place by the end of the school year. All we have really been able to do is marginally complete the information gathering phase of the project. Part of the complexity is that I discovered that there are many ways to set up a strategic plan. In some ways much of this year has been spent actually *planning* for developing a workable strategic plan. This was the first time the school had ever created survey instruments of this scope for this purpose and I learned a lot about *how* to ask questions to get exactly the kind of information you are looking for. I also had no idea how much was involved with data compilation.

Fund-raising is hard work! I discovered very quickly that there are skills involved in donor development and fund-raising that I needed to develop. The donor visits I conducted did not have the results I had hoped for, and the new event did not have the number of people I had envisioned. This area is new to me and I have a long way to go, but I learned a lot and being able to pay down \$70,000 of debt this year over our budgeted amount was encouraging over all.

In conclusion, the Van Lunen Fellowship Program has had a very positive impact on Langley Christian School through this past year and that impact will be felt for years to come.