

STRATEGY FOR INDEPENDENT SCHOOLS

THE ULTIMATE STRATEGY CHECKLIST

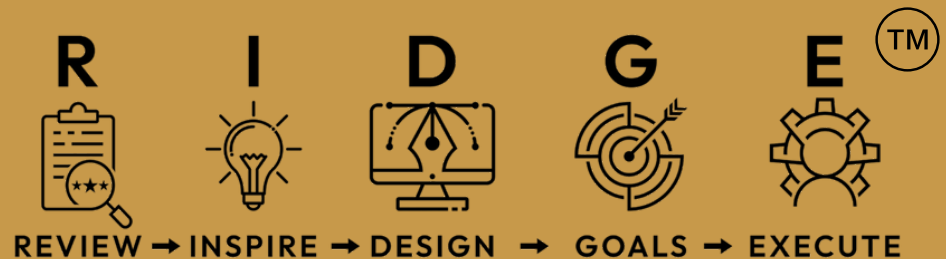
5 STEPS TO COMPEL YOUR TEAM FORWARD & MAKE STRATEGIC CHANGE



<h4>R Review</h4> <p>Start with brutal honesty.</p> <p>What worked and what didn't.</p>	<h5>CHECKLIST</h5> <ul style="list-style-type: none"> <input type="checkbox"/> Has the previous plan been evaluated for impact and completion? <input type="checkbox"/> Have you reviewed enrolment, finances, pedagogy, and competitive positioning? <input type="checkbox"/> Has accountability been accepted for errors and failures? <input type="checkbox"/> Have you challenged assumptions that no longer serve your mission? 	<h5>How to do this</h5> <ul style="list-style-type: none"> ▶ Conduct a surgical post-mortem of the last strategy ▶ Map your values, vision and mission statements to ensure alignment ▶ Engage staff in truth-telling sessions about what's working and what isn't ▶ Ask what have we learned and document changes for the next strategy 	<h5>How Morningtide adds value</h5> <ul style="list-style-type: none"> ▶ Facilitated debrief with leadership and governance, data analysis templates ▶ Supply environmental scanning tools and stakeholder empathy maps ▶ Facilitate reflection workshops using evidence-based protocols ▶ Introduce and instruct leaders to engage with After-Action Reviews (ARRs)
<h4>I Inspire</h4> <p>Project your school's trajectory forward over the next 30-years.</p>	<h5>CHECKLIST</h5> <ul style="list-style-type: none"> <input type="checkbox"/> Have you explored plausible futures (tech, demography, sustainability)? <input type="checkbox"/> Do you have rich, qualitative data about community hopes? <input type="checkbox"/> Have you identified 3-5 "next horizon" opportunities? <input type="checkbox"/> Have you challenged your team with non-school innovation examples? 	<h5>How to do this</h5> <ul style="list-style-type: none"> ▶ Use future-focused provocations to break current thinking ▶ Capture student, parent, and staff aspirations ▶ Highlight big strategic opportunities coming down the road ▶ Introduce bold ideas from beyond the school sector 	<h5>How Morningtide adds value</h5> <ul style="list-style-type: none"> ▶ Deliver scenario planning workshops and assess against uncertain challenges ▶ Co-design survey tools and facilitate focus groups ▶ Help translate data and insight into powerful futurist frames ▶ Curate provocations from business, education, and social ecosystems
<h4>D Design</h4> <p>Strategy is bespoke architecture for your school, your future.</p>	<h5>CHECKLIST</h5> <ul style="list-style-type: none"> <input type="checkbox"/> Does your leadership team understand the school's value proposition? <input type="checkbox"/> Have you mapped initiatives across people, capital, and capability? <input type="checkbox"/> Have key contributors had input before launch? <input type="checkbox"/> Have you stress-tested your plan with "what ifs"? 	<h5>How to do this</h5> <ul style="list-style-type: none"> ▶ Build strategic themes that carry meaning and ambition ▶ Define and articulate your school's value proposition ▶ Engage middle leaders in stress-testing and shaping strategy ▶ Identify risks, barriers, and dependencies 	<h5>How Morningtide adds value</h5> <ul style="list-style-type: none"> ▶ With leaders, deploy a strategy canvas that encaptures competitive advantage ▶ Employ tools to expand or limit the school's service offering ▶ Facilitate communication of strategy to community stakeholders ▶ Create strategic assumptions mapping
<h4>G Goals</h4> <p>Priority should not have a plural form.</p> <p>Define the most important priority and set goals to achieve it.</p>	<h5>CHECKLIST</h5> <ul style="list-style-type: none"> <input type="checkbox"/> Are goals written in terms of impact, not just activity? <input type="checkbox"/> Have you identified short- and long-term metrics? <input type="checkbox"/> Have you narrowed focus to ONE important goal per team? <input type="checkbox"/> Does every goal have a clear owner and a support structure? 	<h5>How to do this</h5> <ul style="list-style-type: none"> ▶ Define a single important goal for the next strategy period ▶ Establish lead and lag indicators for this goal ▶ Ensure alignment of executive and leadership goals ▶ Define who owns each goal and timelines to achieve 	<h5>How Morningtide adds value</h5> <ul style="list-style-type: none"> ▶ Co-write performance metrics with leadership ▶ Provide custom goal-setting dashboards and examples ▶ Help develop focus areas that anchor momentum ▶ Draft responsibility matrix and team accountability plans
<h4>E Execute</h4> <p>Implement the strategy and monitor goals for achievement.</p>	<h5>CHECKLIST</h5> <ul style="list-style-type: none"> <input type="checkbox"/> Have you scheduled regular reviews and updates? <input type="checkbox"/> Have you launched your strategy with clarity and energy? <input type="checkbox"/> Have you identified short-term wins to build momentum? <input type="checkbox"/> Do you have a plan to pivot if goals aren't working? 	<h5>How to do this</h5> <ul style="list-style-type: none"> ▶ Build routines for progress tracking and reflection ▶ Communicate clearly to all stakeholders ▶ Celebrate quick wins and share stories of progress ▶ Adjust and adapt as needed based on data and feedback 	<h5>How Morningtide adds value</h5> <ul style="list-style-type: none"> ▶ Provide implementation check-ins and templates ▶ Draft messaging plans and leadership talking points ▶ Help identify early wins and design internal comms tools ▶ We offer quarterly advisory sessions to recalibrate

Instructions

- ▶ Review the Checklist for each stage with your executive or leadership team
- ▶ Note the items that are pending or have been missed and follow the **How to do this** actions
- ▶ If you need assistance with any of them see **How Morningtide adds value**
- ▶ Book a 30-minute strategy conversation with Morningtide Consulting.



Book your free, no-obligation, strategy conversation today!