



CHOICE TOOLS. PRECISION AIM. BOLD ATTITUDE.



STRATEGIC PLANNING FOR INDEPENDENT SCHOOLS

For over 30 years, OPTIMUS | SBR has helped organizations develop sound strategic plans to guide them to success. Our proven and trademarked system means you can trust OPTIMUS | SBR to partner with you to create a detailed roadmap that will lead you towards achieving your goals. Are you ready to make the first step in maximizing your organization's potential?

STRATEGIC PLANNING FOR INDEPENDENT SCHOOLS

Independent schools offer an attractive alternative for parents who are looking to maximize their child’s educational potential. The primary focus of any school is to provide excellent education to students, but principals and members of the Board are faced with the numbing realities of increased competition, limited access to funding, changing demographics and the challenges of trying to do more with less.

Creating a strategic plan will help schools identify and organize their priorities, allowing them to focus their efforts to educating their students.

OPTIMUS | SBR has the experience and expertise to help independent schools tackle these issues by working with principals and Boards to determine their goals and develop a strategic plan that will provide the steps needed to accomplish those goals.

Signs You Need OPTIMUS | SBR Strategic Planning Services

Are you currently...

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	1. Dealing with rising costs but have limited access to funds?
<input type="checkbox"/>	<input type="checkbox"/>	2. Missing revenue targets due to decreased enrollment levels?
<input type="checkbox"/>	<input type="checkbox"/>	3. Finding it difficult to recruit new students due to competition from other schools?
<input type="checkbox"/>	<input type="checkbox"/>	4. Unable to keep your curriculum competitive with other schools?



If you have answered yes to one or more of the above questions, it's time to speak with OPTIMUS | SBR about your options for creating a brighter future for your school.

Strategic Planning Services

Our team of highly skilled consultants are experienced in delivering strategic planning services to clients in the educational sector, providing proven results that add long lasting value. We understand the issues that you face and the language you speak.

We do not focus on the academic side of the equation but rather on the business side.

Our unique approach includes working with each client to pinpoint the main issues that are hindering their success and working with them to develop a customized, actionable plan that sets clear tasks that allow your organization to meet its goals.

Completed in a two-day off-site session, this easy to use, easy to implement plan provides you with the ability and confidence to achieve your goals.

Benefits of Services

The results of engaging with OPTIMUS | SBR are tangible and the effects can be felt immediately:

- The Vision for the future state of the school is clarified and a strategy is set for how to get there.
- Roles and responsibilities are clarified.
- Better informed decision-making capabilities are grounded in agreed upon directives.
- More effective usage of resources by focusing on key priorities.
- Enhanced competitive advantage.

A STORY OF SUCCESS

An independent school was on the brink of closing. Enrollment was down and the school was bleeding reserve money due to mismanaged funds. The school needed a long term view of the business and to create a sustainable plan. The situation was clear: without taking immediate action, the school would cease to exist, leaving students and parents stranded.

OPTIMUS | SBR worked with the leadership team and Board of Directors to complete a current state analysis to identify the strategy and performance elements that were in place, determine key roles and surface the major issues and concerns.

Using our trademarked organizational strategy framework, the Accountability Framework® System, the OPTIMUS | SBR team led the school’s leadership through the creation of a new vision and values for the school, as well as the five Success Factors needed to achieve that vision.



The diagram illustrates the Accountability Framework® System. At the top, 'ACCOUNTABILITY FRAMEWORK® THE GOAL' is written. Below it, a circular arrangement of five blue segments labeled 'Success Factor' surrounds the word 'VISION'. At the bottom, a blue trapezoidal segment labeled 'VALUES' is shown. A large blue arrow labeled 'ORGANIZATION' points from the circular Success Factors towards a box on the right. This box is titled 'STRATEGIC ACTION PLAN ACTIONS DEFINED' and contains a list of six actions: ACTION 1, ACTION 2, ACTION 3, ACTION 4, ACTION 5, and ACTION 6. Below the box, the text 'WHAT NEEDS TO BE DONE' is written.

These Success Factors were the required elements necessary to achieve the school’s vision and included increasing enrollment, recruiting additional academic staff and improving the financial stewardship of the school.

Guided by these five success factors, a comprehensive Strategic Action Plan was created that served as the manual for the school to follow and achieve each of their success factors over a period of 3 years.

SAMPLE ACTION PLAN									
OPTIMUS SBR	EXPECTED OUTCOME	WHY AREN'T WE THERE YET?	STRATEGIC INITIATIVES	MEASURE	ANNUAL PRIORITIES [Year 1]	ANNUAL PRIORITIES [Year 2]	ANNUAL PRIORITIES [Year 3]	Leader	
VISION	1. Success Factor 1								
	Success Factor Definition	One major goal for your organization related to the Success Factor	Obstacles or limitations hindering achieving the Expected Outcome	How the company is going to achieve the Expected Outcome	How the company will measure the success or failure of achieving the Expected Outcome	What needs to happen in Year 1 as part of the strategic initiative to achieve the Expected Outcome	What needs to happen in Year 2 as part of the strategic initiative to achieve the Expected Outcome	What needs to happen in Year 3 as part of the strategic initiative to achieve the Expected Outcome	Person(s) responsible for owning the priority
	2. Success Factor 2								
	Success Factor Definition	Goals should be aspirational and future focused	These are limitations that the organization faces today List as many limitations as you can	A high level plan in order to achieve the Expected Outcome There could be one or more initiatives, but it must be realistic to achieve in a timely fashion with available resources	There can be multiple measures for looking at the success or failure of achieving the Expected Outcome	Priorities in Year 1 may be build the foundation for a program or initiative	Priorities in Year 2 may be to implement what was started in Year 1	Priorities in Year 3 may be to review and refine what was implemented in Year 2	Name or Initial
	3. Success Factor 3								
	Success Factor Definition	The goal will be centered around the Success Factor, but will align with the other Expected Outcomes	Limitation 1 Limitation 2 Limitation 3	Strategic Initiative 1 Strategic Initiative 2	Measure 1 Measure 2 Measure 3	Priority 1 Priority 2 Priority 3	Priority 1 Priority 2	Priority 1	Name or Initial

In less than 3 years, the school is now thriving and has received international recognition. By following the initiatives and timelines set out in the Strategic Action Plan the school has successfully increased enrollment by over 100% and implemented sound financial management policies to keep costs are under control.

The school is now moving forward with its second three year Strategic Action Plan developed with OPTIMUS | SBR to determine the best way to channel their growth, and how far to grow to.

Our Value

- Experience with best-in-class strategic planning tools and frameworks.
- Deep knowledge and experience within the educational sector.
- Extensive experience with strategic planning exercises.
- Proven partner that delivers immediate and long lasting positive results.

THE BOTTOM LINE

The benefits of strategic planning are clear. OPTIMUS | SBR has the proven experience and the knowledge to develop an actionable plan that will allow your school to operate efficiently, capitalize on goals and effectively handle today's challenges.

Engaging OPTIMUS | SBR will empower you to make smart business decisions so you can focus on delivering educational excellence.

WHO WE ARE

OPTIMUS | SBR is a management consulting firm focused on supporting executive leaders and their organizations in solving problems, facilitating change and optimizing performance.

Since 1979, we have provided leading firms across North America with advisory services customized to address unique needs, including strategy and leadership development, process and implementation planning, and project management.

OUR CAPABILITIES

Management Consulting • Resource Augmentation



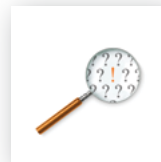
Strategy



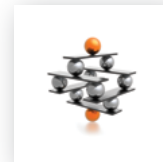
Process Improvement



Project Management



Research & Analytics



Governance & Executive Leadership

OUR VALUES

How we do things is just as important as what we do. Our consultants behave in accordance to our value system:

Teamwork • Integrity • Passion • Initiative • Leadership

PRACTICE AREAS

Our project management experience spans across our key practice areas:

Financial Services | Energy & Infrastructure | Health Care & Not-for-Profit | Government & Agencies



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