

Our Lady of Mercy Certified Strategic Plan Executive Summary

PLC ASSOCIATES, INC.

Building People and Organizations



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Our Lady of Mercy

Strategic Plan Executive Summary

Background

As a result of the Board of Trustees decision to develop a school-wide Strategic Plan, Our Lady of Mercy began a rigorous and ambitious five month process in February, 2010. PLC Associates, Inc., a national consultancy based in Rochester, NY, led the project with Penny Ciaburri, CEO and Dr. Diane Reed, PLC Strategic Partner, as facilitators. Terry Quinn, principal of OLM, served as the Internal Coordinator. The Board of Trustees specifically outlined essential elements of the process and deliverables. According to Board direction, in concert with the PLC Model for Strategic Planning, the protocol was purposefully designed to assure the following:

- Development of measurable targets and goals
- Use of a comprehensive data base, with benchmarking of other high performing institutions
- High levels of participation across a variety of stakeholder groups
- Ongoing discussions with thorough critical analysis of key issues and targeted questions
- A continual, open sharing of information with transparency throughout
- A final Strategic Plan that would guide Mercy over the next five years, with very specifically defined projects and activities
- Inclusion of cost/benefit analysis for the basis of decision-making

Design

A Core Team was designated. This group of 22 members was composed of a diverse collection of stakeholders representing teachers, parents, community, students, administration, and alumnae and Sisters of Mercy. The Core Team areas of responsibility included: Vision, Mission, Beliefs, Parameters, and identifying the Strategic Intents (goals) which would create a powerful, positive ‘blue print’ for the organization. The Team was instructed to deliver a Strategic Plan which would guide OLM over the next five years.

Four Task Forces were identified, focusing the detailed work in key areas essential to OLM’s continued success. These included Academic Achievement, Marketing / Enrollment / Development, Facilities, and Financial Planning. 58 participants served on the Task Forces. Each Task Force identified Facilitators who were members of the Core Team in order to assure integration. Task Forces were charged with detailing the Key Initiatives (multi-year strategies) and Action Plans (specific projects / activities) which would be implemented by OLM once approved by the Board of Trustees.

Task Force Facilitators engaged in regular, scheduled status checks with Penny Ciaburri in order to review progress and view the work in process. This allowed a forum for continued discussion and integration of work. The Task Forces were encouraged to think innovatively while maintaining the continual reference of the OLM Mission and Philosophy which was carried forward from previous work.

The Task Force work process centered on a complete, open sharing of information / work in process. This was continually emphasized and identified as a key to gaining the support which would be essential for

rigorous implementation. Additionally, this open dialogue allowed the school to maximize and benefit from the expertise and input of the larger community. In order to secure quality of work, the Task Forces followed a sequential 15 step process with clear methodology and designated deliverables. This started with an understanding of their Charge, review of Critical Issues (key questions) and a complete analysis of their area through the SWOT technique (Strengths, Weaknesses, Opportunities, and Threats). Correspondingly, the Core Team followed a sequential process, facilitated by Penny Ciaburri, Terry Quinn and Diane Reed.

The Data

An expansive data base was created and made available to the Core Team and Task Forces. This included:

- Standardized Assessments
- Demographic Data
- Facilities Data
- Benchmarking Reports
- Faculty and Student Input
- Grade Reports
- College Acceptance Data

Additional information and research was provided, as requested, by the respective Teams.

The Work Process

The Core Team and Task Forces received initial training and briefing on the process. An “All Task Force Night” served as the kick off for Task Forces on March 30, 2010. The Core Team had 6 Sessions from March 3, 2010 to June 16, 2010. Task Forces met on a regular basis through June, 2010 and continually shared their work in process with Core Team.

Results: The Certified Strategic Plan

The final Strategic Plan includes 15 Strategic Intents and 52 Key Initiatives. These are further supported by highly detailed Action Plans. In implementation, OLM will be able to select designated Key Initiatives and Action Plans based upon time, resources, and staffing. This is an important component as the organization will be able to be in full control over the workload and budgetary elements.

There are several elements around the nature of the OLM Strategic Plan that are very impressive:

- Many strategies may be implemented with a realignment of existing resources.
- A financial model was developed which will allow the school to proactively determine the feasibility and costs of any selected projects and make informed decisions linked to capacity.
- The Strategic Intents cover four key areas, creating both the results that are important for student success, along with the components that will build the internal (within the school) and external (community wide /alumnae) culture.

- The Strategic Plan covers both the global perspective (Vision, Mission, Beliefs, and Strategic Intents) and more specific, detailed strategies (Key Initiatives and Action Plans) which are necessary for sustaining focus over the long term.
- The school will now benefit from specific measureables which will allow OLM to assess results quantitatively.

Summary: The Strategic Intents

- **Academic Achievement: 4 Intents.** These address the goal of having all students complete a dual credit / AP course, increasing the average SAT Verbal, Writing and Math scores to 1800, increasing ACTs to 29, involving all students in a Focus Experience, as well as requiring students to demonstrate a commitment to one of the Critical Concerns of the Sisters of Mercy.
- **Facilities: 3 Intents.** These address the infrastructure to accommodate an enrollment of 850, having 90% of respondents (staff, families and students) indicate high performance in the areas of academics, athletics and performing arts, and reducing the energy footprint by 25%.
- **Marketing / Enrollment / Development: 4 Intents.** These address a comprehensive public relations plan, increases in philanthropic giving, increasing enrollment to 850 and establishing 30% giving from 'reachable' alumnae.
- **Financial Planning: 4 Intents.** These address the need for 100% of the financial aid delivered to be outside of the operating budget, a minimum of \$100,000 for routine maintenance, meeting / exceeding an established rate of return for investments and increasing the endowment to 5 million.

Next Steps

The Board of Trustees will take formal action in the Fall of 2010 subsequent to additional discussion. The Strategic Plan Implementation Team (currently in design) will monitor results and report on a regular basis. Data dashboards will be created to support the reporting of information. In closing, Our Lady of Mercy is well-positioned to rigorously implement and benefit from an ambitious, comprehensive, well-designed Strategic Plan.

Respectfully submitted:



Penny L. Ciaburri, Facilitator
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