

Strategic Planning Worksheet

Sample

Part 1: Situation Analysis Directions: Analyze your current school situation and identify trends, strengths, weaknesses, opportunities, and threats. It can be helpful to have participants prepare their answers to these questions individually and then brainstorm to enhance the creative process of the group.	
Now and In the Future	
Please describe your view of the schools current status.	The school has made some significant strides in developing teachers this year by offering two instructor training opportunities. Still, the consistency between instructors is low and this results in student frustration. While the new curriculum on sports massage is getting rave reviews from students, the student clinic has low attendance. Employers have reported in the latest survey that our graduates do not do a good job of rebooking clients. Finally, there is still a disconnect between the admissions department and the education department.
Please describe where you feel the school should be in one year.	I would like us to continue to focus on our curriculum, particularly the learning objectives in student clinic and a teacher development program. In one year I would like to see more consistency in the teaching methods used by our instructors. I would like the student clinic to function as an actual working clinic, while still providing meaningful learning activities for students. A process or event that helps students transition from being non-students to feeling part of the campus culture might be helpful.
Please describe where you feel the school should be in two years.	In two years the student clinic should be busy with clients receiving excellent services from students. A teacher development program should be well established. We should be looking to add a new continuing education program in spa or maybe for yoga instructors. While yoga instructor training is not part of massage training, it could provide a nice crossover for graduates who want multiple income streams in wellness related fields.
Please describe where you feel the school should be in three years.	In three years I would like the school to look at creating a health and wellness program that incorporates continuing education and the core massage curriculum into one larger program. This would allow our students more financial aid options while providing a new opportunity for our school to achieve its mission and vision of promoting the integration between mind, body, and spirit.
Trends that Could Impact the School Please list and briefly describe three noticeable trends that could impact the future of the school.	
Trend #1:	We are seeing a large, young population that is less prepared for the academic nature of massage school and less committed to massage as a career. We may need to focus energy on how we reach out to this group and teach these students core study skills and interpersonal skills.
Trend #2:	As our program has grown, we have recruited teachers who are younger, less experienced massage therapists. While we do commit time to developing teachers already, this will likely be an area that needs more focus.
Trend #3:	Two new massage schools have opened their doors within twenty miles of our school. As a result we have seen a decrease in enrollment. We need to reach out to the community and place an emphasis on educating the public about the benefits of massage to draw new groups to our school.
Strengths and Weaknesses Please list and describe the school's strengths and weaknesses, based on your observations and perceptions.	
Strengths: Good communication between leadership and departments. The foundation curriculum is well established and functional. The community outreach program implemented two years ago is solid and appreciated by students. Faculty members are supportive of one another and good at problem solving. Staff cares deeply about students. Staff is interested in developing areas of weakness and is	Weaknesses: Admissions and education don't see eye-to-eye on the enrollment process. Some conflict resolution is needed between these two groups. The transition into school for new students is rocky and they often get overwhelmed. We see attrition rates of 5.5 percent in the first 30 days; a new process is needed. The continuing education programs are not marketed effectively. Some programs are popular while others barely hit minimum enrollment. Teachers are younger and less experienced. As a result, classroom management skills are lacking and some classrooms seem out of control.

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<p>willing to exert effort to improve.</p> <p>We have an adequate budget for operating the school and some money available to grow programs.</p>	<p>Many students are apathetic and unmotivated. They seem ready to drop out at the first challenge.</p> <p>The student clinic does not attract enough clients to keep students busy and provide meaningful learning opportunities.</p> <p>Marketing activities do not target a wide range of potential student groups. The marketing plan is weak.</p>
<p>Opportunities</p> <p>Please describe opportunities for the school to improve curriculum, teaching capacity, infrastructure, the learning environment, or market position.</p>	
<p>The opportunities I see for the next year include:</p> <ul style="list-style-type: none"> Development of the student clinic by focusing on marketing activities to build clientele. Continue to build training opportunities for instructors; focus on classroom management. Focus on the development of the continuing education curriculum. Eliminate classes that have little appeal and create new opportunities for learning popular modalities. Look at the possibility of developing a health and wellness program. Revise marketing and reach out to new student groups. Analyze and improve the handoff of new students from admissions to education. Reduce the attrition of new students to less than 2 percent. 	
<p>Threats</p> <p>Please describe threats that might influence the school's future.</p>	
<p>The main threat at this time comes from the two new schools that now compete with us for students. We need to identify how we set ourselves apart from these competitors and refocus our marketing efforts.</p>	

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Part 2: Goal Identification & Evaluation

After analyzing the situation individually in Part 1, participants bring their notes to a bigger meeting where the group shares ideas and defines key goals. The form below helps schools organize the goal-setting process.

This sample highlights the development of one goal, but schools are likely to have many goals that different people or committees are working on simultaneously. As goals are completed, they are evaluated so that progress can be tracked and shared at upcoming planning sessions.

Goal Statement: Build student clinic clientele to provide more learning opportunities for students.	Assignment: Create student clinic committee to manage this goal.	Completion Date: Fill 22 sessions weekly by August 2008.
Milestone #1: Implement client referral program.	Activities: <ul style="list-style-type: none"> • Develop client referral program. • Print client referral cards. • Promote the program to current clients. • Track client referrals. 	Results/Evaluation: The client referral program was a bit complicated at first and clients were unsure of how to promote the clinic and receive their rewards. The program was simplified during the second half of the term and, so far, has led to seven new clients who visit the clinic weekly. It will be important to continue to promote the program to reach our goal of filling 22 spots per week by August.
Milestone #2: Create grassroots marketing plan.	Activities: <ul style="list-style-type: none"> • Have students brainstorm and implement two ideas for grassroots marketing. • Post flyers at all local health food stores. • Contact chiropractors in the local area and provide them with brochures. Give each chiropractor a gift certificate for a free session at the clinic. • Sponsor a pregnancy day one day a week at the clinic and give pregnant clients a discount. 	Results/Evaluation: The students came up with some excellent marketing ideas and the brainstorming session was a positive classroom activity. One idea was to offer 15-30 minute seated massage in the clinic lobby and pass out coupons to businesses within walking distance. This has really increased clinic traffic and given students a chance to practice seated massage skills.
Milestone #3: Distribute student gift certificates.	Activities: <ul style="list-style-type: none"> • Provide each student with five coupons, for half-priced massages, that they can give to friends and family. 	Results/Evaluation: Interestingly, students are using these gift certificates themselves to receive massages after school. This is a positive development, as it leads to better student self-care.
Milestone #4: Encourage presentations by students.	Activities: <ul style="list-style-type: none"> • Give students ten extra credit points for giving a presentation on the benefits of massage. • Put a process in place to review presentations before they are offered to groups. • Provide students coupons to the clinic to hand out at the presentation. • Put a process in place to help students identify groups who would enjoy massage presentations. 	Results/Evaluation: This idea didn't work at all. Students are simply too busy and too stressed out to even consider putting work into a presentation. While it would be an ideal way for students to build their public speaking skills, it is not a workable program at this point. We might consider making this a required activity and provide students with class time to develop their presentations. Otherwise it would be better to find other ways to promote the clinic.