

## **ACLE 4 Presentation Proposal**

1. Paper Presentation

2. Presenter

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Banker by profession

15 years in school business management

Been heavily involved in the establishment of Geelong Lutheran College, a new P-12 school in Geelong and the expansion of Good News Lutheran College Werribee from a small primary school into a vibrant P-12 College.

3. Method of Delivery

PowerPoint presentation with handout notes

4. Title

“Wise Planning”

5. Description of Issue

In the ever increasing complex environment schools now operate in it is critical that our Lutheran Schools plan their future. This session is designed for Business Managers, Principals and those in Governance and will explore key requirements of the following planning processes:

- a. Setting Strategic Directions
- b. Developing a Master Plan to fulfil strategic directions
- c. Creating a Business Plan that will enable timely delivery of the master plan to fulfil the school's strategic directions

6. Approach used to solve

By following a set of clear principles and guidelines, Lutheran Schools will be able to undertake their planning with confidence and professionalism.

7. Possible results or outcomes of approach

Better school planning

8. How links to theme of conference

School leaders need to “Wise Up” to their planning!

# **WISE SCHOOL PLANNING**

## **Presentation Notes to ACLE 4**

**Wednesday 2<sup>nd</sup> October 2013**



### **A summary of the three areas of focus:**

#### **1. Strategic Directions**

##### **a. Ministry & Mission**

- i. The Lutheran community
- ii. Mission activity and opportunities
- iii. Worship
- iv. Christian education
- v. Faith formation
- vi. Inter denominational interaction
- vii. Pastoral care and wellbeing

##### **b. Situation Analysis**

- i. Background
- ii. Current position
- iii. Influencing factors
- iv. Competitor position
  - Location
  - Size
  - SES/ICSEA scores
  - Educational focuses

##### **c. Demographics**

- i. Population trends
- ii. Enrolment opportunities

##### **d. Educational/Curriculum Goals**

- i. Current
- ii. Planned
- iii. Delivery methods and options

##### **e. Staffing**

- i. Current structure
- ii. Future needs/mix
- iii. Professional and spiritual development plans

**f. Facilities**

- i. Current
- ii. Needed
  - Essential
  - Desirable
  - Optional

**g. Financial Modelling**

- i. Review
  - Past performance
  - Current position
- ii. Future forecasts
- iii. Scenario planning
- iv. Benchmarks and performance targets to be achieved

**h. Funding**

- i. Recurrent
  - Government support
  - Fees to be charged
- ii. Capital
  - Government support
  - Donations
  - Borrowings required

**i. Marketing**

- i. Current focus/activities
- ii. Future plans/strategies
- iii. Measurements of success

**j. Risk Management/Mitigation**

- i. **SWOT Analysis**
  - Strengths/Weaknesses = internal
  - Opportunities/Threats = external
- ii. **Risk Assessment**
  - Internal factors
  - External factors
  - Down and up sides

## **2. Master planning**

- a. Planning principles & objectives**
- b. Educational brief**
- c. Existing conditions**
- d. Spatial analysis**
- e. Facility needs**
- f. Proposed solutions/options**
  - i. Buildings
  - ii. Traffic & parking
  - iii. Activity hubs
  - iv. Outdoor spaces including sports/recreation areas
  - v. Building typology
  - vi. Views/vistas
  - vii. Environmental management and sustainability
  - viii. Future expansion
  - ix. Staging plans
- g. Costings**

### **3. Business Plan**

#### **a. Executive Summary**

#### **b. Mission/Vision/Values**

#### **c. School Environment**

- i. Overview
- ii. History
- iii. Main activities
- iv. Operations
- v. Technology
- vi. Competitor advantage
- vii. Suppliers & terms of payment
- viii. Business management
- ix. Human resources
- x. Legal environment
- xi. Business systems
- xii. Risk management
- xiii. Insurances

#### **d. Educational Environment**

- i. Overview
- ii. Market characteristics
- iii. Enrolment trends and opportunities
- iv. Market positioning/niche
- v. Social and cultural impacts
- vi. Economic conditions
- vii. Political and legal impacts
- viii. Special interest groups
- ix. Environmental issues

#### **e. Competitor Analysis**

- i. Independent schools
  - Catholic
  - Other
- ii. Government schools

#### **f. Marketing Plan**

- i. Target market
- ii. Promotion
- iii. Fee pricing

#### **g. Risk Management**

- i. SWOT analysis
- ii. Risk assessment/plans

## **h. Financial plans & Viability Assessment**

- i. Past & current years
- ii. Projections
  - Out 5 years
  - Out 15 years

## **i. Capital Funding**

- i. Government
- ii. Donations
- iii. Loans
- iv. LLL Matching Deposits

## **j. Review & Analysis Process**

- i. Timing including key trigger points
- ii. Key Benchmarks and performance targets

Presented by:

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