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!
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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