

STRATEGIC PLAN 2019-2022

Executive Summary

Children's Scholarship Fund Philadelphia

FALL 2019



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A. PURPOSE

Born out of a national model, Children’s Scholarship Fund Philadelphia (CSFP) opened its doors to the local community in 2001. Charged with providing needs-based scholarships to children from marginalized families throughout Philadelphia, CSFP is a privately funded program motivated by the following mission:

CSFP is a privately funded program whose mission is to provide children from low-income Philadelphia families with financial access to quality, safe, tuition-based, K-8th grade schools, thereby increasing their long-term economic and social success.

Currently, the organization serves over 5,000 children who attend roughly 170 private and parochial schools.

CSFP embarked on this strategic planning process as a response to a leadership transition and as an effort to adjust to the ever-changing fiscal and educational landscape. Focused on assessing its current efforts in order to determine the potential for greater impact, CSFP explored some of the following inquiries throughout the planning process: Who do we want to be? How many do we want to serve? How do we want to serve them? Should we be measuring our schools’ quality and outcomes more?

B. PLANNING PROCESS OVERVIEW

Over the course of eight months, CSFP partnered with Bloom, a local, education-focused, strategic planning firm, to engage in a thoughtful research and planning process to assess the organization’s needs and develop a strategy to foster alignment and clarity for all organizational stakeholders including staff, board members, school partners, and families. The resulting plan establishes a five-year vision for impact and articulates a detailed plan for the first three years of implementation. Furthermore, this plan includes critical SMART (Specific, Measurable, Achievable, Realistic, and Time-bounded) objectives and accompanying metrics for each initiative area to help CSFP gauge progress and achieve success. CSFP intends for this strategic plan to be a living, working document that will guide future decision-making and execution, and which leadership will regularly monitor and update.

Figure I.1 Five phases of CSFP’s strategic planning process



WHAT IS A STRATEGIC PLAN?

- A self-created roadmap to guide decisions, growth, and change, and to help us realize our collective mission and vision for the future
- A process of stakeholder engagement yielding a set of carefully considered domains and goals that bring our core priorities into focus for the next five years
- A living document that will be revisited and revised on a regular basis

A STRATEGIC PLAN IS NOT...

- A tactical plan
- A static document
- Everything everyone wants nor everything the organization does

PHASE I: RESEARCH

The first step in the strategic planning process involved a robust research phase to gather stakeholder input and develop leadership’s perspectives. Through a variety of feedback opportunities, stakeholders from across the CSFP community had the opportunity to reflect on the organization’s strengths, areas for improvement, threats, and opportunities as well as provide feedback on general satisfaction.

PHASE II: VISIONING

To make meaning of the extensive information gathered during the research phase, CSFP staff and leadership convened two sessions to build understanding and align around intentions for the future. Each meeting advanced the creation of a long-term vision for impact for CSFP.

- **Meeting 1:** March 11, 2019—Research review and visioning with core planning team
- **Meeting 2:** April 10, 2019—Research review, visioning, and priorities with full planning team

Vision for Impact—in 10 Years...

CSFP will:

- Analyze data to ensure our scholarships and programs provide the support families who are under-resourced require to access schools that serve their children best.
- Cultivate and manage varied sources of funding.
- Maintain a large base of diverse school partners to meet students’ individual needs.
- Collaborate with educational and community organizations to improve educational opportunities for all children.

Our goal is to be an impact-informed organization that provides all children with the full opportunity to pursue success (however it is they define success) and to improve the economic viability of our city.

Stakeholder Interviews

- **15 live interviews; 17 participants**
- Representatives included staff, board, school partners, and parent ambassadors
- **Stakeholder Live Interview Report**

Stakeholder Surveys

- **2,914 survey respondents**
- 30 staff and board members
- 1,684 current families
- 307 alumni families
- 775 nonstarter families
- 118 school partners

Focus Groups

- **Two 90-minute focus groups**
- Staff: six participants
- Parent ambassadors: 10 participants

Environmental Scan

- **Four comparable/competitor organizations explored**
- Assessed organizational mission, grade levels served, scholarship composition, funding model, and staffing structure

PHASE III: PLANNING

For the planning phase, the full planning team convened to articulate SMART objectives and strategies for each planning domain. Then, the core planning team met with Bloom to create an action plan for one preselected planning domain. CSFP's leadership assigned the remaining planning domains to members of the core planning team who completed relevant action plans.

- **Meeting 1:** May 22, 2019—SMART objectives and strategies planning workshop with full planning team
- **Meeting 2:** June 24, 2019—Detailed action planning demonstration meeting with core planning team

PHASE IV: ACCOUNTABILITY

To ensure successful implementation of the detailed action plans, Bloom worked with CSFP's leadership on a series of accountability activities resulting in the creation of the following tools:

- Metrics & measures dashboard
- Accountability & communication plan
- Risk identification, mitigation & contingency plan

PHASE V: FINALIZATION

This strategic plan represents the culmination of CSFP's robust, multi-month strategic planning process. While the document itself captures the plan at a point in time, the action plans to achieve its goals will continue to evolve as implementation progresses. To ensure continued progress, the full strategic plan is accompanied by an *Implementation Tool* which includes an adjustable metrics dashboard and master task list designed to be updated as the work is completed.

C. PLANNING DOMAINS

DOMAIN 1: FUNDRAISING

The fundraising domain explores CSFP's financial viability, taking a closer look at the ways in which the organization can diversify and grow its current donor portfolio. This domain aims to ready CSFP to launch a capital campaign while determining how to build partnerships with new donors and schools in order to generate more financial support and, likewise, long-term sustainability.

Statement of Intent: CSFP has been a successful fundraising organization, but with a changing philanthropic climate due to unpredictable market forces, it must focus more on the diversification and sustainability of funding streams and its donor mix in order to raise 1) critical scholarship revenue; 2) revenue for related programmatic support of families; and 3) revenue to ensure an excellent and impactful operational organization.

Five Planning Domains



Strategic Initiatives & SMART Objectives

1.1 Capital Campaign Readiness	By 2022, CSFP will expand and reorganize the fundraising capacity of the organization to have in place the team to launch a capital campaign.
1.2 Fundraising Through SPEs	By 2022, CSFP will raise more money through individuals SPEs.
1.3 Balanced Funding Approach	By 2022, CSFP will create a more balanced sustainable funding approach by having each type of donor as a comparable percentage of funding.
1.4 Partnership Fundraising	By 2022, CSFP will create partnerships with area high schools and other educational organizations to leverage additional fundraising.

DOMAIN 2: SCHOLARSHIPS

The scholarships domain investigates how CSFP can use data to: 1) explore attrition; 2) expand its scholarship footprint; and 3) strengthen its program offerings to families. In deepening its understanding of data, CSFP will also roll out a stronger communication plan for its current and alumni families as well as school partners.

Statement of Intent: Over the past 17 years, CSFP has awarded scholarships in a fair and equitable manner to under-resourced families in Philadelphia. To continue to do so, CSFP will use quantitative and qualitative data from families and schools to:

- Make informed decisions about scholarships, including award amounts, number of scholarships given out annually, and partnerships (e.g., Independence Mission Schools).
- Determine the best ways to provide supplemental/supportive programming that both fits within our core mission and best serves our families.

CSFP will provide these services while staying informed about the educational landscape in Philadelphia and using our voice to advocate for systemic change that is relevant to our mission and programming.

Strategic Initiatives & SMART Objectives

2.1 Attrition Research & Understanding	By 2022, CSFP will have a data-informed approach to addressing attrition that distinguishes among the primary reasons for attrition and substantiates the organizational philosophy on responsiveness to and prevention of attrition.
2.2 Family & School Communications	By 2022, CSFP will have a revised/updated communication plan that consists of a seasonal timeline and deadlines, expectations, and reminders for school partners and new and existing families. This communication plan will be comprehensive and include both paper and digital versions.
2.3 Expanded Scholarship Reach	By 2022, CSFP will have an outreach plan for accessing communities less served by CSFP’s scholarships and will have a streamlined scholarship award process that is transparent and family focused.

2.4 Additional Scholarship & Supportive Programming Opportunities	By 2022, CSFP will use data to determine appropriate scholarship expansion (e.g., pre-K) and additional or different supportive programming.
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DOMAIN 3: FAMILY, SCHOOL & COMMUNITY PARTNERSHIPS

In the family, school, and community partnerships domain, CSFP looks to better engage and expand its current parent ambassador and alumni streams. In strengthening its connection with parent ambassadors and alumni, the organization will better communicate its mission and impact. CSFP will also work closely with its school partners, increasing parent awareness surrounding resources and opportunities.

Statement of Intent: In addition to providing financial access to schools that best fit our scholarship students' needs, CSFP will ensure families have access to necessary information, resources, and support to evaluate and compare educational options and successfully navigate the school application process. To do so, CSFP will:

- Continue to assess and maintain a wide network of accredited private schools throughout the greater Philadelphia region, including independent, special education, and faith-based schools representing a variety of religions. While each partner school is unique and independent, collectively our partner schools will reflect a shared foundation of positive student outcomes and commitment to families.
- Train and equip parent ambassadors as peer advocates for our scholarship program to increase awareness of opportunities for Philadelphia children who are under-resourced, while simultaneously strengthening communications with our partner schools and parent communities.
- Engage in strategic, collaborative partnerships with local educational entities, corporations, and philanthropic groups to strengthen community relations, develop initiatives that enhance learning for our scholarship students, and connect our school partners to other programs and funding sources allowing them to serve more families.

Strategic Initiatives & SMART Objectives

3.1 Parent Ambassador Roles	By 2022, CSFP will have one to two parent board members, will expand the PA program to include all partner schools with 12 or more scholarship recipients, and will create a feedback mechanism for parents at all schools with fewer than 12 students.
3.2 Alumni Engagement Program	By 2022, CSFP will build a plan for alumni engagement by first conducting a needs assessment so that we can better understand our impact, inform our programs, and build a source of future donors.
3.3 Parent Resource Hub	By 2022, CSFP will collaborate with our partners to leverage funding to create cross-system opportunities for parent education.

DOMAIN 4: LEARNING CULTURE

In the learning culture domain, CSFP studies its systems and practices to better understand current impact and ameliorate future impact. Staff will partner more closely with board members to grow the latter’s knowledge about the organization’s practices in order to strengthen organizational stewardship.

Statement of Intent: CSFP will adopt a growth mindset across the organization, fostering an environment in which each individual feels they can contribute their talents in meaningful ways. We will focus on cultivating a strong and supportive organizational culture in which employees feel empowered to voice their opinions and engage in open, honest discussion. We will respect the work and opinions of each other and the families we serve. We strive to learn from data and people. CSFP will:

- Develop strategies to maintain transparency across the organization.
- Ensure efficient systems for data collection and analysis. We will keep an open mind to learning from families and schools and adapting to effectively be in community with them.
- Focus on collaboration and inclusivity in decision-making. When possible, organizational decisions will be made with diverse groups of employees, utilizing relevant and accurate data to inform approach and outputs. Employees will respect and support decisions made through this transparent process, including those that do not reflect the viewpoints of an individual team member.

Strategic Initiatives & SMART Objectives

4.1 Data Evaluation Systems	By 2022, CSFP will define, collect, and analyze the data needed to measure and evaluate organizational goals on an ongoing basis.
4.2 Board Learning Program	By 2022, CSFP will implement a program to inform the board through board meetings and other mechanisms about CSFP programs and their impact.
4.3 Partner Engagement Plan	By 2022, CSFP will develop a plan for engaging schools to help them understand the benefits of CSFP scholarships for school enrollment and CSFP scholarship attrition.

DOMAIN 5: CAPACITY BANDWIDTH/HUMAN CAPITAL

The capacity bandwidth/human capital domain leads CSFP in developing and implementing a professional development plan for both staff and board members. This domain is geared toward recruiting and retaining talent, allowing the organization to maintain and build institutional knowledge, and furthering its impact within the greater community.

Statement of Intent: CSFP will operate under a code of mutual respect among staff, families, board members, external partners, and all members of our community. We will provide opportunities for the board and staff to connect and interact, to encourage understanding about the vital role each individual plays in achieving our mission.

We will engage strategies that foster a culture of continuous improvement, while providing a safe, ethical, and supportive work environment for all. These will include methods of:

- Securing and developing top talent.



- Creating growth opportunities for staff within their roles.
- Formalizing professional development programs to support individuals' goals.
- Conducting a needs assessment to determine the organizational capacity needed to reach goals and provide ways to support staff in meeting the stated organizational goals.
- Providing continued positive and instructive feedback for staff members, alongside goal-setting and alignment of performance and growth areas with goal achievement.

Strategic Initiatives & SMART Objectives

<p>5.1 Human Capital Plan</p>	<p>By June 2022, CSFP will implement a well-articulated human capital plan, informed by a robust needs assessment, to maximize impact for the organization.</p>
<p>5.2 Professional Development</p>	<p>By 2022, CSFP will successfully implement a professional development plan derived from the needs assessment that will include hiring processes, onboarding/training, professional development, and formal recognition.</p>
<p>5.3 Staff-Board Collaboration Plan</p>	<p>By 2022, CSFP Board and staff will work knowledgeably and strategically in tandem to increase organizational efficacy and further the mission of CSFP.</p>
<p>5.4 Core Values</p>	<p>By 2022, CSFP will have core values woven into the fabric of the organization and all staff and board will enact these values in their roles.</p>

D. ACCOUNTABILITY & COMMUNICATION

The accountability plan scopes the parameters that CSFP staff will follow to support the implementation of its strategic plan. It is meant to act as an insurance policy, ensuring the success of hundreds of hours of work and thought put into the creation of the strategic plan over the past year by articulating structures and procedures for executing the plan. Components include:

1. **Key players**—the people responsible for holding the organization accountable for implementation
2. **Rollout**—communication plan for sharing the final strategic plan with the CSFP community
3. **Progress-monitoring process**—the timeline and structures that will be put in place to monitor task completion and keep the plan on schedule
4. **Risk planning**—a plan that identifies risks, along with near-term mitigation strategies, and longer-term contingency plans

E. METRICS & MEASURES

CSFP is deeply focused on ensuring all stakeholders are invested in the organization’s vision for impact. To that end, CSFP will use a targeted set of metrics to monitor progress toward achievement of these goals. The metrics and targets are aligned to each of the five domains and will utilize existing measures – including parent and staff surveys – to ensure consistent data collection and monitoring.



G. CSFP'S STRATEGIC PLAN AT A GLANCE

VISION FOR IMPACT

In 10 years, CSFP will:

- Analyze data to ensure our scholarships and programs provide the support families who are under-resourced require to access schools that serve their children best.
- Cultivate and manage varied sources of funding.
- Maintain a large base of diverse school partners to meet students' individual needs.
- Collaborate with educational and community organizations to improve educational opportunities for all children.

Our goal is to be an impact-informed organization that provides all children with the full opportunity to pursue success (however it is they define success) and to improve the economic viability of our city.

STRATEGIC INITIATIVES

DOMAIN 1 Fundraising	1.1 Capital Campaign Readiness 1.2 Fundraising Through SPEs 1.3 Balanced Funding Approach 1.4 Partnership Fundraising
DOMAIN 2 Scholarships	2.1 Attrition Research & Understanding 2.2 Family & School Communications 2.3 Expanded Scholarship Reach 2.4 Additional Scholarship & Supportive Programming Opportunities
DOMAIN 3 Family, School & Community Partnerships	3.1 Parent Ambassador Roles 3.2 Alumni Engagement Program 3.3 Parent Resource Hub
DOMAIN 4 Learning Culture	4.1 Data Evaluation Systems 4.2 Board Learning Program 4.3 Partner Engagement Plan
DOMAIN 5 Capacity Bandwidth/ Human Capital	5.1 Human Capital Plan 5.2 Professional Development 5.3 Staff-Board Collaboration Plan 5.4 Core Values