



LEADERSHIP+DESIGN

## **Proposal for St. Paul's Schools Baltimore, Maryland**

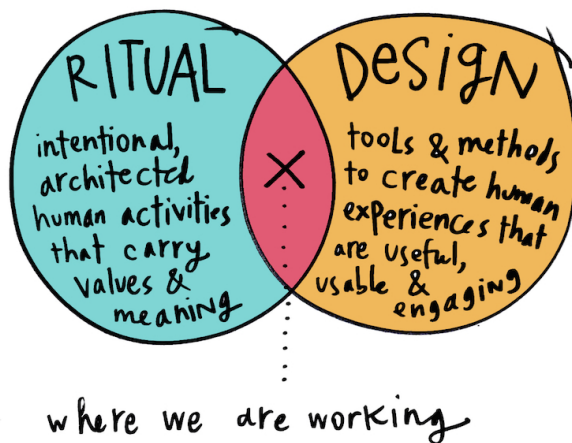
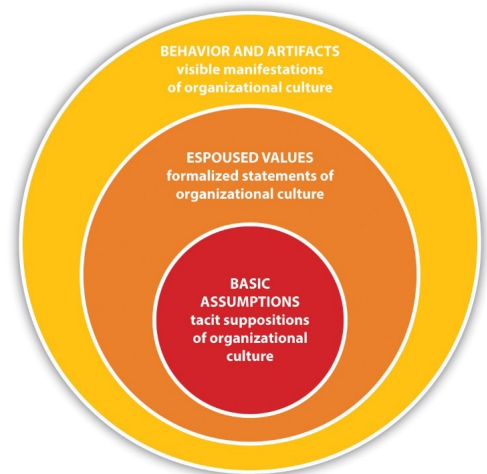
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# Strand 1. Culture

In this strand, Leadership+Design will guide a process to design an emerging culture in partnership with a design team composed of members of each of the St. Paul's Schools: faculty, staff, and students.

But what does it mean to design culture?

MIT Professor and social psychologist Edgar Schein, whose research defined much of what we know about organizational theory, talked about the three levels of organizational culture. Artifacts are visible representations of an organization's culture; espoused values are stated values and rules; underlying assumptions include the behaviors and values that are not stated but rather implied and often as undetectable as the air we breathe. Schools should pay attention to the alignment between these three elements, as well as the gaps between what we say and what we do.



Basic assumptions are tough to change, and they can't be tackled directly. Schein's model is a reminder that old mental models lurk under what's visible, but they also remind us that culture has visible layers which, over time, can influence basic assumptions of the organization.

One type of artifact is a ritual. In the words of Kursat Ozenc and Margaret Hagan, authors of *Rituals at Work*, "Rituals are powerful tools: they reinforce good habits, motivate personal and professional achievement, create a common bond between co-workers and build shared values; they can transform an organization's culture and provide a foundation to achieve common goals." The first day of school, Homecoming, and graduation are all examples of rituals in school communities.

Because rituals are so important in school life, they are a fruitful entry point for cultural shifts. The rituals we perpetuate send powerful messages to everyone about what it means to be part of a community, and over time, these rituals can become beloved (or disliked) traditions. But every tradition was invented at some moment in time, and this is an opportunity for the school to re-evaluate old traditions – and consider creating new ones.

Finally, artifacts can be physical objects that have cultural significance. What is on the walls? What key objects (e.g. a bell, a chapel, a mascot) have value? How can those artifacts be re-evaluated and refreshed to affirm the shared identity of the unified school?

At the end of work in this strand, the school will have examined its existing cultures, defined the culture that it wants, and designed new rituals, artifacts, and traditions that can affirm the school's shared identity and common direction.

Process:

This process involves one two-day visit to campus, two one-day visits, and intervening remote meetings.

**Phase 1: What are the cultures we have?** The design team will examine the culture of the three schools through in a process of appreciative inquiry that explores artifacts, espoused values, and basic assumptions. This will happen in one day on campus with the design team, followed by one or more remote meetings. This design session will be preceded by a one-day visit of the consultant to campus in order to better understand the current situation.

**Phase 2: What is the culture we want to build together?** If possible, this thinking will include a meeting of all three faculties guided by Leadership+Design. When doing this work, we will emphasize that the culture of the shared school will be built on assumptions and values that already exist in portions of the school; culture grows slowly, and it doesn't change just because you ask it to. This exploration will happen in another full-day session on campus with the design team, followed by one or more remote meetings.

**Phase 3: What artifacts will help us build that culture?** Finally, the design team will design new artifacts across three schools, using a design thinking sprint, and introduce those artifacts in 2022-2023. This will happen in a final full-day session on campus with the design team, followed by one or more remote meetings.

## Strand 2: Mission Development

The following mission process will enable the St. Paul's Schools to include the voices and perspectives of a diverse set of stakeholders – from founders and alumni to current students and from members of the professional community to current parents. It starts at Basecamp and ends at the Summit with a refreshed mission statement that is grounded in the history of the school but clearly points to the future.

St. Paul's Schools will start by assembling a Mission Statement Design Team that will work with Leadership+Design to steer the process and help move the divergent thinking of the various focus groups into a final mission statement. We suggest this team has representation from members of all three school communities, with attention paid to including influential members of the community who are also open to new ideas and collaboration. There will be plenty of opportunities to get feedback along the way from additional stakeholders, including parents and students, who may not have the opportunity to serve on the design team.

We'll facilitate pre-work via remote engagements, creating a container for the work and to on-board the Design Team and ensure that the team understands its role and some basic framing of the process. We'll frame the experience using William Stafford's poem "The Way It Is" and his metaphor of the invisible thread as an example of how a strong mission runs through the life of a school. We'll also share key elements of a strong mission and support the committee in considering how a mission might help the school distinguish itself in a competitive market.

More background on Leadership + Design's approach to mission design is available in [this article from Independent School magazine](#).

### Journey Phase 1: The Past

Having a strong sense of the past and the origin story of the school offers insights into the "threads" of the school. The founding and early years of any organization offers clues to its identity. While the new mission statement will be forward facing, exploring the past is critical. An example of an activity to do at this point is a salon dinner with founders, parents, students, and educators important in the past of each school. L+D will support the documentation of key stories and themes, and help the committee distill that conversation for salient themes.

### Journey Phase 2: The Present

The second phase allows the team to explore the current stories of the school and to leverage in the mission what is most valued by stakeholders. Examples of relevant activities at this stage include Virtual Story Collecting Sessions with Parents, Faculty/Staff, and Students; Artifact Sharing; "Shadow a Student" for Committee Members. Here as earlier, L+D will support the documentation of key stories and themes, and help the committee distill that conversation for salient themes.

### Journey Phase 3: The Future

Now we look ahead to the mission of the future. The team will embody a "futurist mindset" and explore the signals - the shifting demographics, industry trends, and the changing tides of work and school. An example activity at this point could be a TED-like Talks ("SPSTalks") on the

Future of Learning - a virtual community event - followed by a methods to collect the ideas that are generated by attendees. This could be built as an opportunity for board and/or whole community engagement, as well. (Logistics for such an event would be managed by the school.)

#### Journey Phase 4: Summit

Grounded in the threads, leveraging the best of today, and future-focused on the emerging and yet unseen needs of students and families in the Baltimore independent school market as well as the changing tides in education and work, the Design Team will pull together a final synthesis of three phases and begin the process of prototyping mission statements to circulate for feedback from stakeholders. This work will happen virtually.

# Strand 3. Strategic Planning

## Overview

Strategic planning is a regular part of independent school life, but strategic plans often fail to facilitate a real change in strategy.

An over-emphasis on quantitative metrics, which are seen as more pragmatic in professional work cultures, can lead schools to neglect the qualitative work needed to generate new insight and develop human-centered solutions.

Given that lack of insight, plans become a collection of individual projects rather than signaling a clear strategic direction.

These plans can hyper focus on deliverables and timelines, providing a rigid map with little room to maneuver when circumstances change, whether that be disruptions in the market, leadership transition, or new opportunities.

Finally, since traditional strategic planning is often driven by a closed group, the final plan isn't execution ready. Instead, it feels like a surprise to the people who will need to implement it, and they neither understand or believe in the tradeoffs that are being called for.

We believe strategic planning is an exciting opportunity to rally your community around a conversation about the future, but we also believe that a different approach is needed to do so. Leadership+Design offers an innovative strategic planning experience designed to achieve the following outcomes:

- **A Clear Compass:** Our final product will provide a strong sense of your future direction — a compass backed by a set of priorities and initiatives to work towards, grounded in your mission, core values, history, vision, and culture.
- **Strategic Insight:** Strategic planning should do more than capture the current thinking of the community; it should deepen your community's understanding of what's possible. By embracing a design thinking framework for strategic planning, we anchor your work in a deep exploration of what your school community needs now — an exploration that pays off with more insightful ideas about your school's future.
- **Inclusive Process:** We involve dozens, sometimes hundreds, of people beyond the Strategic Planning Team, which helps the team explore the school's position through multiple lenses and perspectives. In the first half of the process, members of the Strategic Planning Team will conduct extended "empathy interviews" as a way to better understand the variety of lived experiences and needs that are present in your school today. In the latter half of the process, our "Community Day" event provides an opportunity for scores of constituents to help shape the plan before it's final.
- **Community Buy-In:** As important as the final product is, process is what ultimately builds human and institutional capacity, creates buy-in and ownership for the plan, and strengthens school culture. The L+D process is not only inclusive, it's creative and engaging. It commu-

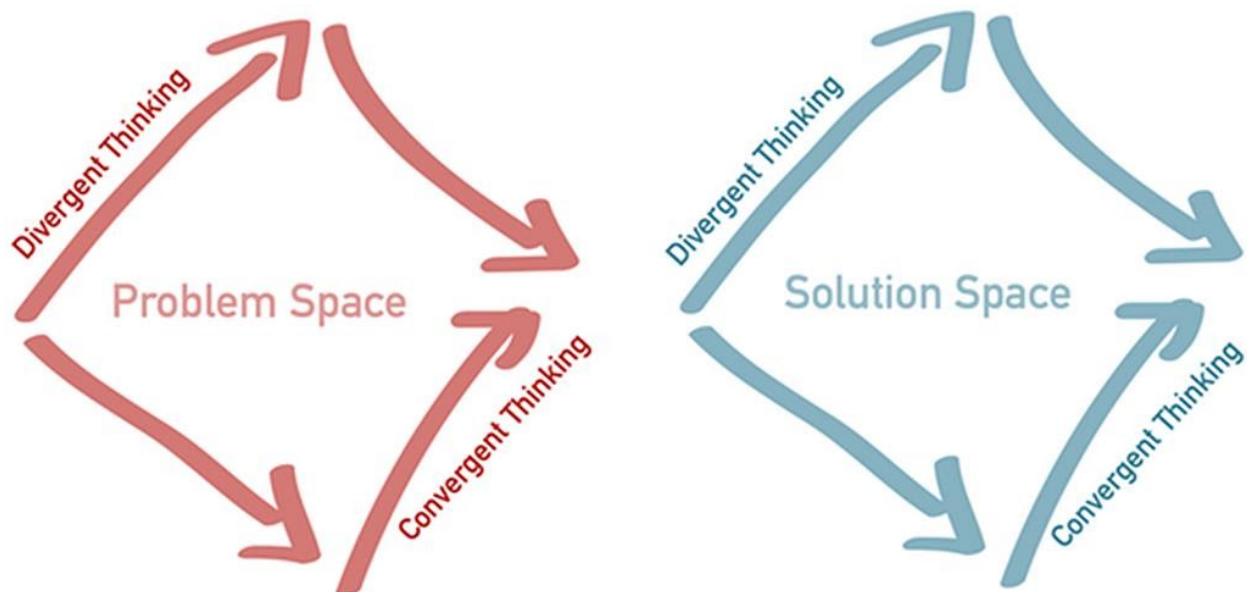
nicates the forward thinking of the school and builds a sense of shared excitement in where things are going. At the end of a L+D process, people can say with pride, “look what we did together!”

- **Strengthened Leadership Capacity:** We also like to believe that the L+D process adds value beyond the final product because it can transform the way a community approaches challenges and opportunities. We introduce and practice new habits, mindsets and skill-sets that are transferable to other projects. When participants experience success in using those new tools, they are generally eager to do so.

## Process

We deliver these outcomes through a human-centered, six-stage process inspired by design thinking. Our process feels different from traditional models of strategic planning, and it's a core reason why we achieve strong outcomes for our clients.

1. **Pre-Planning:** Ensuring your core team is on the same team about the process and its scope. Lay the groundwork for success with a strong committee and process.
2. **Exploring The Opportunity Space:** Gathering a broad range of insight to understand what problems, opportunities, and needs should be considered in the plan.



3. **Converging on Inquiry Areas:** We guide your team to a thoughtful distillation of salient themes and produce focused, manageable set of Inquiry Areas (problems, opportunities, and needs) to develop plans around in the second half of the process.
4. **Exploring Possible Solutions:** Generating a broad and innovative set of potential approaches to each challenge. This is a great moment to invite the broader community to participate in the process and design potential solutions collaboratively.
5. **Selecting Desired Solutions:** Converge on a final set of goals in each Inquiry Area, and flesh out what each will look, sound, and feel like when it's achieved.

6. **Iteration and Delivery:** Continue iteration until it's ready for approval. Work with your leadership team to support action planning and implementation.

Our proposed timeline for the process is flexible and open for revision.

## Stage 1: Pre-Planning

Before starting any journey, it is imperative that the travelers get prepared and have their business in order. Schools sometimes jump into a strategic plan without having done some important work, which can cause planning processes to stall or derail.

Before beginning this process, the following should be completed:

- ✓ Mission and core values are current and supported by the Board of Trustees and Leadership.
- ✓ Key leadership has been identified for the strategic planning process: in particular, a strategic planning chair and possible members of the planning team. These individuals should have time and enthusiasm to lead this process, possess a growth mindset, and enjoy collaboration and high levels of ambiguity.
- ✓ The school has considered the amount of time it would like to spend on the strategic planning process — a semester, a year, two years — and has budgeted funds to match the process. (*Our process can be done as quickly as 4 months, but most schools take a full year.*)
- ✓ The school has considered the duration and scope of the plan. Is this a three-year plan, a five-year plan, a plan that connects with the school accreditation timeline?
- ✓ The school has determined how broad or narrow they would like the plan to be? How many initiatives can a school successfully tackle in three to seven years? How bold and imaginative can this plan be? Are there limitations to the areas for exploration or is everything on the table?
- ✓ The school has determined how inclusive the planning process should be. Will this be a process primarily driven by the board or will the process include the administrative team, faculty, parents, students, and/or alumni? To what extent will they be involved?
- ✓ The school has explored whether or not to use quantitative data gathering as a part of the planning process and has considered possible quantitative survey instruments it may want to use during the planning process. This often includes existing survey instruments.

If your school's leadership has reflected on these questions and made these key decisions, it is ready to start the process. L+D will work with the school to complete these details, which may include a face-to-face meeting with the Head of School, members of the Leadership Team, the Board Chair, or other individuals.

- An orientation meeting with Head of School, Board Chair and Strategic Planning Chair to clarify objectives, goals and deliverables for the process (virtual). These meetings are ongoing throughout the year; typically, this group will meet once between each full team meeting to ensure a healthy feedback loop between the school and the consultant.
- Supporting selection of Strategic Planning Team (15-18 members is usually about the right size) and/or Strategic Planning Chairperson.



- Helping you determine what data needs to be collected given probable areas of focus, and making plans to collect that data if it's not already at the school's fingertips.
- Selecting pre-reading for the Strategic Planning Team.
- Developing a timeline and scheduling initial meetings in collaboration with you.

## Stage 2: Exploring the Opportunity Space

Starting the process with a beginner's mindset allows the strategic planning team and Leadership+Design to be curious, ask questions, and adopt a posture of inquiry as they learn about institutional and stakeholder needs. This stage begins with a highly divergent discovery process and ends by converging on 3-5 major questions or challenges the school hopes to address in the plan.

- A kickoff meeting with the board introduces your L+D consultant, provides an overview of the process, and provides an opportunity to ask questions. This can be virtual, or it can be in-person if held adjacent to Meeting #1.
- Your L+D consultant will spend two full days on your campus:
  - One of those days is **Meeting #1** with the Strategic Planning Team. This first meeting is a full-day, in-person meeting and it should be scheduled when everyone can attend. This meeting is focused on building a sense of team, exploring the context of strategic planning, reviewing any data the school has collected, and generating questions for our work. This day ends by training the Strategic Planning Team to do field research on campus — interviewing and observation. This in-person meeting must happen during a regular school day on campus so that they can immediately practice what they've learned.
  - On the second day, your L+D consultant will spend a full day on campus to engage in campus ethnography and collection of qualitative data. This usually includes meetings with parents, students, faculty, and staff; photographing elements of the campus/daily life; and some time shadowing students during the school day. This immersion allows the consultant to know your community more deeply, collect a wide range of constituent feedback, and provide an external check on your planning team's emerging thinking.
- **Meeting #2** will review stakeholder interviews and generate insights, building on our earlier questions and research to identify preliminary Areas of Inquiry in our planning process. We will form Inquiry Teams, one focused on each area, identify additional research that might be necessary. This may include school visits, reading, researching other programs, and stakeholder interviews. This can be in-person or virtual.
- The Strategic Planning Team conducts internal and external research, exploration, and discovery around the school's competitive landscape and any other areas determined in the pre-planning process.

## Stage 3: Converging on Inquiry Areas

- **Meeting #3** is an opportunity for committee members to share a second round of research focused on what's changing in the landscape around the school. This might be focused on the school's competitive landscape, trends that are changing the context for the school, and/or unpacking the needs of the community beyond the school walls. Following a debrief, the

committee reflects on what they learned in both Meeting #2 and #3 and uses that learning to determine 3-5 “Areas of Inquiry” for the remainder of the strategic process. Each Area of Inquiry is framed as a question rooted in a problem, opportunity, or need that was uncovered during the discovery process. When the plan is completed, each question will have a plan associated with it. At this point, the committee will be divided into “inquiry teams,” each focused on one of those questions, and be given more homework to research each area before Meeting #4.

- **Meeting #4** is an opportunity for Inquiry Teams to share their research, giving and receiving feedback with the committee as a whole. This search often refines/revises the school’s preliminary Areas of Inquiry. They also share proposed “strategic priorities” in each area, which receive feedback from the committee as a whole. This is a virtual committee meeting.
- When this research is complete, their work will be synthesized by your L+D consultant into a series of design briefs, one focusing on each Area of Inquiry. These design briefs are reviewed by the Head of School, Strategic Planning Chair, and others they may designate before being shared further. This cycle of review typically sharpens each proposed strategic priority.

## Stage 4: Exploring Possible Solutions

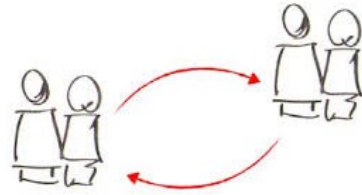
This phase is an opportunity for the Strategic Planning Team to experience creative, divergent thinking as it looks to develop solutions and answers to the challenges and questions that emerged through the discovery phase. This phase ends with a broad set of potential initiatives to move toward each strategic priority.

- **Meeting #5** will generate ideas for how the school might address strategic priorities with a broad range of stakeholders. These ideas are distilled into a set of initial concept maps for proposed initiatives. We often facilitate a more inclusive “Community Day” event that allows a wide range of constituents to experience the process in person, generate ideas together, and prototype what these initiatives might look like. This day generates great thinking, but just as importantly, it often generates stronger community buy-in. This is an in person meeting.

## Stage 5: Selecting Desired Solutions

- The Strategic Planning Team synthesizes ideas from Meeting #5 into a set of recommendations for the first draft of the plan.
- L+D, Head of School, and Strategic Planning Chair develop the first draft of a plan for review and feedback.
- Feedback from stakeholders as we ask them “Are we headed in the right direction?”
- **Meeting #6** reviews feedback and begin to develop a higher fidelity version of the concept maps and draft language of the strategic initiatives (a virtual meeting).
- During this phase, the strategic planning team will test their concepts and refine them. Sometimes this includes additional research and exploration to inform new questions, and/or taking in stakeholder feedback and adapting concepts accordingly.

- Your school (with help from L+D) will continue to get feedback from key stakeholder groups and individuals and refine the draft of the plan/concepts.
- **Meeting #7** of the Strategic Planning Team is held to review and refine the final plan to be delivered to the board for review and approval (a virtual meeting).



The final report is prepared for submission to board and administrative team for review and final feedback, with the expectation that the board will approve the plan at either a June, August, or September board meeting.

## Stage 5: Implementation + Delivery

As with any plan, the rubber meets the road with a strong implementation plan and mindset. Leadership+Design will facilitate **one virtual meeting** with the leadership team of the school when the plan is completed to help the team prioritize, strategize, and get energized around the work they will do to see the plan move forward.

# Coordinating the Three Strands

When contracted in parallel, there are significant opportunities for St. Paul's Schools to benefit from the interplay between each of the three project strands.

## Framing Core Values for the Schools

We anticipate bringing the teams in Strand 1 and Strand 2 together for facilitated Zoom meetings at key junctures during the process. The purpose will be to share impressions and lessons, ensuring that the work of each team is coherent. Collectively, they can also develop a list of espoused values for the St. Paul's Schools.

## Constituent Think Tanks

Each strand begins with a listening session in the community, which we typically call "Think Tanks." By conducting three think tank sessions with three nesting areas of focus, the school has the opportunity to engage the community in a broader dialogue about the future of St. Paul's Schools. These conversations could be branded as a series (e.g. The St. Paul's Schools Community Conversation Series) to engage the community, collect ideas, and generate goodwill as the schools enter a new phase.

## Parallel Discovery Means More Insight

Since discovery for the culture and mission strands would happen in parallel with the strategic plan's discovery process, the inquiry areas formed in the second half of the strategic planning process can be influenced by more insight. L+D will coordinate dialogue between each team to help make that happen.

Q1	Q2	Q3	Q4
Strategic Planning Strand: Exploring the Opportunity Space and Converging on Inquiry Areas		Strategic Planning Strand: Exploring Possible Solutions and Selecting Desired Solutions	
Culture Design Strand: Exploring the Current Culture and Defining the Desired Culture			
Mission Design Strand: Telling Stories From Our Past and Examining Our Present Purpose			

# Your Leadership+Design Consultants



**Greg Bamford** is a Co-Founder and Senior Partner at Leadership+Design. Prior to this, Greg was Associate Head of School for Strategy and Innovation at Charles Wright Academy in Tacoma, Washington, and Head of School at the innovative Watershed School in Boulder, Colorado. He is a co-founder of the Traverse Conference, a national conference on experiential and place-based learning, and is on the Board of Trustees at his alma mater, The Overlake School in Redmond, Washington.

With his experience in school leadership, Greg brings a strategic lens to leadership development, innovation, and change management for Leadership+Design clients. He is particularly passionate about building leadership capacity and the cultural muscle to enact needed change. Greg has been a featured speaker at dozens of education conferences, has consulted with a wide range of schools nationally, and has written for publications like Independent School, Net Assets, and The Yield. Greg lives in Tacoma, Washington with his wife and two children, both alumni of independent schools.



**Shu Shu Costa** (she/hers) is the director of enrollment management at Moorestown Friends School and a L+D Leader-in-Residence. In that role, she has partnered with Leadership+Design principals on a range of client engagements while remaining employed as a full-time school leader. Shu Shu's L+D consulting experience includes facilitating strategic plans, board retreats, and Wonder Women! Next, a program for women in school leadership. She has led SPARC (Spirited Practice and Renewed Courage), a program for educators that explores the conversations between our inner selves and our professional lives. Next year, Shu Shu is leaving her school role and will be available for consulting full-time.

Shu Shu has been a teacher, a mentor, a division director, an assistant head of school, a strategist, and a board member. She has been a city newspaper beat reporter, the managing editor at a glossy magazine, and her two books have been published by Simon & Schuster and Putnam. What joins all those experiences together is her love of people, organizations, and their remarkable stories, both the ones we tell to ourselves and the ones we use to create journeys and relationships with others. Shu Shu was born in Penang, Malaysia, is a graduate of Cornell University, and is the proud mom of three children. She lives in New Jersey with her husband, a dog, and a six-toed cat named Hemingway.