

Strategic Decision-Making: A Business Case Framework for Independent Schools



Thank you!



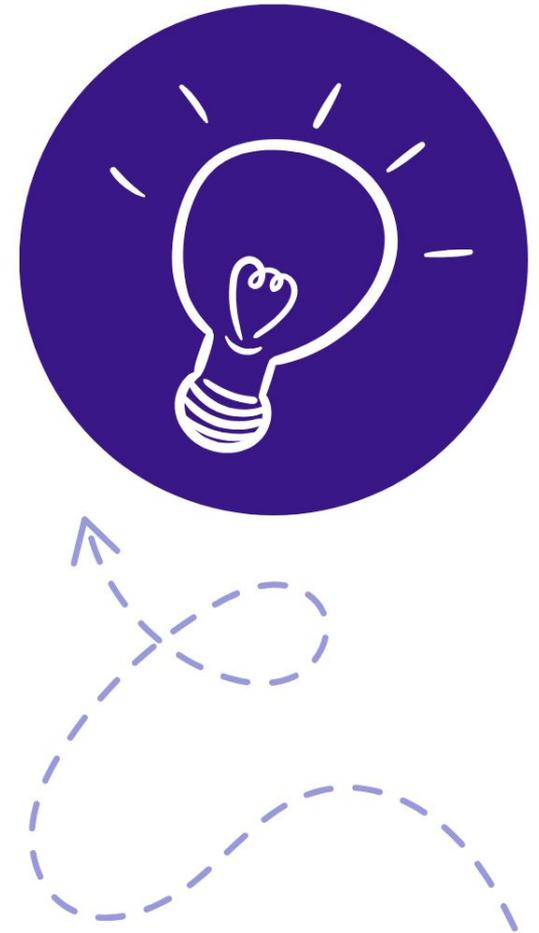
Agenda

- Part One:** Introduction
- Part Two:** The Business Case Canvas
- Part Three:** Case Study: Sampleton Prep
- Part Four:** Group work
- Part Five:** Reflection and Q&A

Outcomes for Today

By the end of the session, you'll walk away with three things:

- **A practical way to pressure-test a strategic idea** before committing time, money, or political capital.
- **Experience using a real school case** to clearly articulate the core problem, key risks, and potential upside of a proposed initiative.
- **A decision lens you can take back to your school** to help your leadership team decide what deserves deeper investment and what doesn't.



Hi, I'm Peter Baron

Boarding school graduate and Certified Top Coach™ by Top Teams—the methodology behind the School Operating System (SOS).

Spent the past 20+ years as an association leader, board member, and **passionate champion for independent schools with one goal: to help you and your school succeed.**

Helped thousands of independent school leaders with enrollment, marketing, professional development, hands-on training, information management, and more.

My interviews with over 150 Heads of School has shown me the power of systems thinking.



Organizations where I worked to support independent schools like yours.

MoonshotOS



blackbaud®



ADMISSIONSquest

ed Social Media

How I support independent schools:

Membership

- **Moonshot Lab** – A professional learning community that helps school leaders build business acumen and innovate their school's business model.

Strategy & Advisory

- **Business Model Retreat** – Map your school's business model, build shared understanding among board and leadership, and identify opportunities for growth.
- **School Operating System (SOS)** – A framework that helps schools turn their strategic plan into action through rhythm, accountability, and measurable progress.

**Why we're here today:
to equip you with a
straightforward framework for
validating a new idea before
committing resources.**

For example... you have a **2M** gap that you need to fill with Annual Fund. You may be looking to launch a new program to shrink the gap, but will this work? How do you validate the idea and make the case to your head of school, leadership team, or board?

Introducing the Business Case Canvas

Business Case Canvas

Problem or Opportunity <i>What's the problem we need to tackle? Where does the problem occur? Who's feeling the impact of this problem? How long or how frequently does the problem occur?</i>	Risks <i>What could happen if we don't deal with this problem soon? What are the short and long-term impacts?</i>	Ideal State and Alternatives <i>What does success look like? Are there any other alternatives to get to the same goal?</i>	Resources and Budget <i>What critical resources are required (physical, intellectual, legal, human, or financial)? What special skills, training, or external resources are needed? How much will this project cost?</i>	Implementation Plan <i>How would you recommend implementing the project? What are the major milestones?</i>
	Benefits <i>What do we stand to gain if this project hits succeeds?</i>	Mission Alignment <i>How does this project contribute to the core mission of the organization? Does the project support or enhance the organization's values and culture? In what ways does the project advance the organization's long-term strategic goals?</i>	Timeline <i>What is the project timeline? How long will the project last?</i>	

What is it?

The Business Case Canvas is a strategic tool that outlines and evaluates a proposed project's key elements, helping leaders analyze and present crucial factors for decision-making. It advises on actions by analyzing benefits, costs, and risks and justifies projects and planning implementation.

Think of it as a stress test to determine whether you commit to the project or divert the idea to the parking lot.

The full canvas has three parts.

Today, we will focus on the first decision gate.

1 Why is this project critical?

Explore the imperative reasons that justify this project. What specific needs or gaps does it address within the organization?

2 What does success look like?

Describe the ideal conclusion of the project. What specific achievements or milestones will indicate that the project has reached its intended goals?

3 How will we implement the project ?

Outline the essential actions, phases, and resources required to navigate from project initiation to successful completion. What are the key processes and strategies involved in this journey?

1 Why is this project critical?

This is where most decisions should slow down.

Business Case Canvas

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Why is this project critical?

Problem or Opportunity

- What's the problem we need to tackle?
- Where does the problem occur?
- Who's feeling the impact of this problem?
- How long or how frequently does the problem occur?

Risks

- What could happen if we don't deal with this problem soon?
- What are the short and long-term impacts?

Benefits

- What do we stand to gain if this project succeeds?

2 What does success look like?

Business Case Canvas

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What does success look like?

Ideal State and Alternatives

- What does success look like?
- Are there any other alternatives to get to the same goal?

Mission Alignment

- How does this project contribute to the core mission of the organization?
- Does the project support or enhance the organization's values and culture?
- In what ways does the project advance the organization's long-term strategic goals?

3 How will we implement the project?

Business Case Canvas

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How will we implement the project?

Resources and Budget

- What critical resources are required (physical, intellectual, legal, human, or financial)?
- What special skills, training, or external resources are needed?
- How much will this project cost? Will this project generate revenue? If so, how much?

Implementation Plan

- How would you recommend implementing the project?
- What are the major milestones?

Timeline

- What is the project timeline?
- How long will the project last?

Benefits of the Business Case Canvas

Clarified Decision-Making:

Provides a clear visualization of project aspects, aiding informed and transparent decisions.

Enhanced Stakeholder Alignment:

Facilitates communication and support from various stakeholders, ensuring unified project approval.

Improved Resource Allocation:

Ensures efficient use of resources by focusing on projects with the highest impact potential.

Risk Management:

Identifies potential risks early, allowing for proactive mitigation and better preparation.

You may be asking, “how can I start using this at my school?”

- We’re going to apply a sample case study to part of the canvas today.
- I recommend conducting a case study with your board or team, or possibly even using today's case study.
- Then you can use the canvas for an opportunity at your school.

Let's do a two minute rapid focus

- Share one thing from the canvas that resonated
- Share one question you have about the canvas

Case Study: Sampleton Prep

Sampleton Prep is an all-boys private school that has nurtured young minds since its founding in 1920. Catering to students in grades 6 through 12, the school is renowned for its commitment to excellence in education and character development. Sampleton Prep is home to 275 students, providing a close-knit community where each student receives personalized attention and is encouraged to achieve his full potential.



**SAMPLTON
PREP**

Sampleton Prep: A School at an Inflection Point

Introduction to the Challenge:

Despite its rich history and commitment to excellence, Sampleton Prep has encountered significant challenges in maintaining its student body. Over recent years, the school has experienced a steady decline in enrollment numbers.

Impact of the Challenge:

This decline affects the school's vibrant community atmosphere and places financial strain on its operations, threatening the sustainability of its programs.

Urgency of Addressing the Issue:

The need to reverse this trend is critical. It requires innovative strategies and thoughtful solutions to attract new students and retain current ones, ensuring the school's legacy continues to thrive.

Your Objective

Use the case to decide whether a tuition reset deserves further exploration.

1. **Analyze** the provided case study details

Complete Part One of the Canvas:

2. Clarify the core **Problem or Opportunity**
3. Surface meaningful **Risks**
4. Identify potential **Benefits**



You may be thinking, “Peter, I need more information, training, resources, and time to complete the canvas...”

Review the Case Study

All session resources are available here:

<https://bit.ly/business-case-workshop>



Why is this project critical?

Problem or Opportunity

- What's the problem we need to tackle?
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Risks

- What could happen if we don't deal with this problem soon?
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Benefits

- What do we stand to gain if this project succeeds?

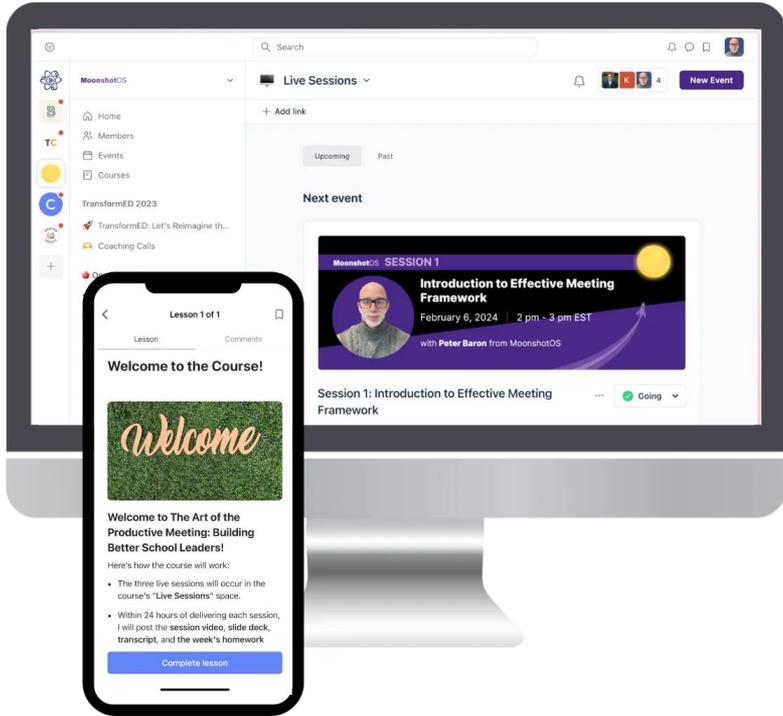
What did we accomplish today:

- We applied the sample case study to one part of the canvas today.

(**DONE!**)

What happens next?

- Complete a case study with your team when you return to school.
(It can even be today's case study!)
- Use the canvas for an opportunity at your school.



Thank you!

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Let's Chat!

