Case Study: North West London Faith School receives agility plan to survive and thrive

On the brink of closure unless a robust strategy, investment proposal and action plan were put in place; AGILITY X helped deliver a sustainable business case and agile delivery plan for the North West London Faith School.

A North West London private fee-paying school passionate about wholesome education was struggling financially. AGILITY X was chosen to deliver a business case, strategy and agile delivery plan to help the school grow, invest and be sustained.

The school needed to reorganise for success and they did not have the staff onboarded who knew how to bring in revenue. The majority of their employees only had skills or experience in teaching or operational maintenance and not creating or substantially developing any revenue streams other than the standard school fees.

**Key points**

**Challenges:**
- School fees only accounted for 30% of the operational costs, their main sponsor provided the further 70% every year to help fund operations, this was not sustainable and no longer a feasible funding source
- There was not enough money to run the school, so fundraising was the first priority as part of the package from AGILITY X
- Financially unhealthy, multiplication on funds raised was the strategy to take the school forward
- Through the biblical parable of the ‘Talents’, we understand that cashflow is crucial to any organisation. Multiplying and having more than one income stream is not just a safety net but a financial necessity
- Tuition fees is the foundational income stream for most schools, but fundraising, donor programmes, partnerships and investments all contribute to the profile of a financially healthy school
- Having a sustainable operational business model with a sound cost and benefit assessment protects investments, creates opportunities and allows decision makers to ensure stakeholders get the best out of their interests
- Delivering change in a sustainable agile method allows customers to work alongside, own the changes, reflect on what has been delivered and commission more change every four weeks
Who:
The North West London Faith School has been in operation for decades, however in the last five years their financial health has been weak. Without a viable strategy that could be actioned quickly to bring in sustainable revenue, the school was to close down within a year. They needed investments yearly of up to £1 million to sustain the operations of the school.

The school is largely run by educators, creating a need for a more robust team of specialists and subject matter experts in different fields to drive business areas such as, sales, admissions, marketing, strategic planning, revenue, fundraising, discipleship and so on.

The Board of Governors were at a loss and were introduced to the AGILITY X school’s model of grow, sustain and invest.

Challenges:
The school’s enrolment was under capacity by at least 30%. Relatively unknown, they depended solely on word of mouth and a moderate online presence to attract students. The school required a holistic package that included a boost financially and being recognised in the community along with many measures to ensure long-term stability and short-term wins. This school is one of the best kept secrets in the North West area of greater London.

Poor financial health
1. One income stream focused solely on tuition fees, yet had many empty desks, suboptimal classrooms and an inconsistent tuition fee model
2. Demonstrated that they had no way of optimising their single source funding and lacked a strategy for their income stream
3. Did not understand their cost of services as operational expenses

Organisational structures and resources
1. The school needed to organise for success, and they did not have staff onboarded who knew how to bring in revenue. There were no revenue generating experts, no fund raisers, marketing experts, or sales leaders
2. No formal Headteacher to make leadership decisions, inadequate temporary Head of School from within the ranks was used for more years than was healthy
3. Not organised on key service functions to be performed to bring in funds to sustain the school. The model was based on temporary workers and volunteers
4. There was no selection, recruitment, or evaluation or KPI process for key resources

Leadership
1. Lack of understanding on what leadership is, the approach was tactical and not strategic, and they were more reactive than they should be. The vision was not always clear or executed when it was communicated
2. Sponsorship in the school from a leadership perspective was low - the champion for the school was an outsider brought in to chair the Board of Governors
3. The governance in the school was lacking
Solution:
AGILITY X, in partnership with Influencing Generations for Christ (IGC), came together to help deliver unique solutions for the school. The aim was to release value incrementally and iteratively, achieving this via a practical, result-oriented, agile strategy and plan, initiated by self-funded projects and sustained with training.

Outcomes of an Optimal School System

- Student Transformation
- Academic Excellence
- Financial Health
- Leadership Development
- Student Retention
- High Staff Morale
- Evangelism
- Positivity
- Hope
- Encouragement
- Energy
- Growth
- Parent Satisfaction
- Unity
- Kingdom Impact

Building upon research and findings from the customers, strengths, weaknesses, opportunities and threats, AGILITY X created a phased approach; an Agile Action Plan that highlighted phases and steps within each of the core components.

The phase timelines and proposed budgets are followed up with retrospectives to review and adapt, with results-focused milestones, to ensure the initiatives are working.

The strategy was broken into 5 phases:
1. Stabilise the school
2. Implement Minimal Viable Product (MVP’s)
3. Improve
4. Progress
5. Sustain

‘The phase timelines and proposed budgets are followed up with retrospectives to review and adapt, and results-focused milestones, to ensure the initiatives are working.’
- Eugene James, AGILITY X
The agile implementation focused on seven sprints with varying durations to ensure the solutions were implemented, trained and embedded.

1. Initial fundraisers and additional revenue - Designed to raise up to £250,000 - Peer to peer fundraising strategies - Use of advanced crowd fund strategies
2. Marketing & Admissions – Parent/teacher development models
3. Financial Sustain Plan
4. Leadership Development
5. Strategic Plan
6. Discipleship Plan
7. Governance Plan

The phased strategy enabled the school to work in four-week sprints, allowing them to review progress regularly and the retrospectives allowed teacher/parent/governor feedback to be addressed.

Starting with the fundraising strategy allowed the school to invest in the right skills and people. Looking to sustain and grow student numbers and income, they were directed to invest in a new Headteacher and marketing and sales support. In addition to new members of staff, training was also offered to teachers, to better implement revenue generating opportunities and ideas. Setting the foundation and strengthening the core team with the right skillsets to carry this transition forward was a key strategy to implement early in the process.
The plans were designed to be quick win orientated, so as results come in, the leadership team could see and identify the value and benefits delivered, they were able to move forwards and look at building stronger relationships with a parent/teacher development model. With their new marketing and sales support they were able to utilise their knowledge and strengths to create advertising and promotional plans to increase student numbers and retention: the very start of creating a more sustainable income.

A new recruitment process and evaluation for teachers was introduced to aid in the visibility and progress of the sprints.

To support all these changes outlined in the plans, it was crucial that the leadership team and new head were aligned with the implementation process. Through quick wins, short term gains are embedded in the process of change, the School and transition will take several years to become fully financially stable and sustainable to secure the schools future. Its about taking it one term at a time.

The project and transition will take several years to become fully financially stable and continued support from Agility X and the various partners will be available as each term passes where the school may inspect and adapt to secure the schools future.

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- Eugene James, Agility X
Expected results:
Financial health
- Significantly reduced funding from owning body to acceptable levels from £750,000 to £0
- Developed & implemented a Targeted Enrolment Program
- Creation of a Variable Tuition Plan
- Development of Student Retention Plan
- Implementation of the Financial Sustainability Plan
- Advertising & Promotion plans / Social Media / Event Marketing

Year 1 – over 150K in fundraising
Year 2 – optimising operations, creation of alternative revenue and enrolment income targets a £250,000 increase
Year 3 – alternative revenue and full enrolment targets a £500,000 net financial improvement

Organizational structures and resources
- New Headteacher employed
- Training as revenue generators
- New roles in marketing and sales
- New recruitment process and evaluation using KPIs for all resources with quarterly reviews for process improvement

Leadership
- Leadership assessment and feedback
- Leadership workshops and coaching
- Leadership Development Plan
- Established monthly cadence for governance and project reviews
- 360 observations and retrospectives

Currently the school is implementing a variety of plans to keep it open, and they have already hired a new Headteacher. Unfortunately, the COVID-19 lockdown has introduced unique challenges. However, the agile plans and solutions can be further inspected and adapted to address new issues as we exit the lockdown. There is nothing stopping the school from elevating from survive to thrive.

Having major epics or phases where change is delivered in four-week sprints allows the school to inspect the results and adapt with minimal financial commitment. Having complete examples of new services, fundraising initiatives or new revenue streams that can be developed and even repeated, promotes some of the best of agility in business.

Having a variety of specialised resources focused on revenue generation, marketing and governance who work together as a sprint team allows efforts to be focused with a shared vision.

- Kelly Blake, IGC

Having a prioritised list of challenges to work through and breaking these challenges into sprints where value and results can be demonstrated every four weeks allows for quick wins and bolsters confidence at the beginning of a four-year turnaround.
What can others learn from this example?

You can’t do this by yourself, educators are not generally revenue generators, neither are Agile Project Managers. It’s a combination of resources that pool experience and skill to successfully execute a robust strategy, such as AGILITY X and IGC. For example, though pilots fly planes, and are critical to the airliner business, you wouldn’t imagine an airliner only having pilots to run the business of flying planes, there are many other crucial roles to get the passengers on the plane and to support the plane taking off. Likewise, educators/teachers aren’t trained with a focus on successfully helping a school thrive financially. It’s about getting the right team in place behind you.

How does it relate to Business Agility worldwide?

Help schools thrive and not just survive, advancement of faith is crucial to Christian schools and what we help them to do is to thrive. We help school leaders to grow from a self-funding base, exceeding expectations and ‘feeding the need’ with a sound financial strategy that adopts the inspect and adapt method to promote continuous improvement.

AGILITY X delivered a package to unlock the potential in the school and prepare the ground for growth and investment:

- A customised Business Plan & solution with two options, tailored to the school’s specific needs
- A comprehensive “findings” report indicating the strengths, weaknesses, opportunities, and threats
- A comprehensive report indicating the most pressing issues and opportunities for the school
- Phase timelines and detailed proposed budgets, with retrospectives (to review and adapt) and results-focused milestones built into the plan to ensure the initiatives are working
- A comprehensive Agile Action Plan that will include itemized phases and steps within each
- Implementation services and a support package to help overcome obstacles and smooth the path as the recommended solution is rolling out

‘It’s a combination of resources that pool experience and skill to successfully execute a robust strategy’

- Eugene James, AGILITY X
How to find out more:

AGILITY X and Influencing Generations:
AGILITY X, in partnership with Influencing Generations for Christ (IGC) - a professional services and solutions provider that helps Christian schools become financially sustainable and operationally excellent, so they can focus more on the most important effort – the discipleship of students. The plan we help to create and implement for customers is designed to be self-funding.

Priding themselves on identifying your challenges quickly and designing strategies to address them, always keeping top of mind your organisation’s needs for minimal disruption to the student’s education.

They help not-for-profits to release value incrementally and iteratively and in this context they help schools and the stakeholder groups of students, parents, teachers and governors.

They achieve this via practical, result-oriented, agile strategy and planning, self-funding projects and training.

They have a phased approach where they partner with customers, including their senior leadership and management teams to develop and run with the solutions that make sense and delivers lasting value across all nine identified areas of a private Christian school.

Learn more at: www.agilityxsolutions.com

Agile Business Consortium:
The Agile Business Consortium is the leading not-for-profit professional body for promoting and enabling business agility worldwide. We work with partners and alliances to promote Agile practices, and to develop, curate and share Agile resources with the wider world. The direct descendent of the DSDM Consortium, we encourage an agnostic and client-centred approach to the use of Agile methods and frameworks.

We are the brains behind AgilePM®, AgileBA® and AgilePgM® and organise the longest running Agile Business Conference in the world. With the support of APMG International we have accredited over 300 training organisations worldwide and certified over 150,000 Agile Project Managers, Business Analysts and Programme Managers; and we’re still growing.

Learn more about business agility and the Consortium at: www.agilebusiness.org