

## PROPOSAL FOR THE FACILITATION OF A STRATEGY DAY

### Arranging a Bespoke Strategy Day

AGBIS provides a range of services to its member schools and this includes the facilitation of strategy days. Many organisations find it helpful to use an independent facilitator for strategy days, as it is sometimes difficult for those with a detailed working knowledge of the School to be truly objective about the process. AGBIS's staff can help design and facilitate exactly the right type of strategy for the School using their extensive sector knowledge and previous experience.

The process for arranging and AGBIS-led bespoke strategy day is:

- Stage 1: The Chair / Head / Clerk contacts AGBIS to enquire about arranging a strategy day.
- Stage 2: A discussion (usually a telephone conference) takes place to enable AGBIS to gain a detailed understanding of the status of the school's existing strategy and establish the aims and objectives for the day itself.
- Stage 3: AGBIS develops a draft programme for the day which is then shared with the School and is developed jointly into a final programme. The School makes all the necessary logistical arrangements and provides AGBIS with all the background information required to facilitate the strategy day.
- Stage 4: The strategy day takes place either virtually or in person and the Clerk records the decisions and actions – the School then incorporates these into a revised strategy document.
- Stage 5: Some schools like to invite AGBIS to run a review session, usually around two years after the strategy day, to assess the effectiveness of the strategy and make any modifications required.

### Typical Strategy Days

No two strategy days are quite the same, as no two schools are the same – hence all AGBIS-led strategy days are carefully planned by our experienced staff to meet the needs of the individual school. Below are some general formats for different types of strategy days which can be used as the starting point for a discussion on exactly what format should be used, depending on the prevailing situation.

---

#### **Association of Governing Bodies of Independent Schools**

The Grange, 3 Codicote Road, Welwyn, Herts AL6 9LY  
Tel: 01438 840730 Fax: 0560 3432632 Email: [admin@agbis.org.uk](mailto:admin@agbis.org.uk)

### Pre-Strategy Day:

Occasionally Governing Bodies need to hold a preparation day before they can plan a successful strategy day – such a day may consist of:

- Refresher training by AGBIS
  - Roles and Responsibilities of Governors
  - Safeguarding update
  - Governors' Role in Strategy
- Assessment of School's current strategy documents
- Evaluation of the current strategy
- Discussion on the nature of the strategy day

This is effectively a detailed Stage 2 (see above) after which AGBIS will commence the design of the bespoke strategy day.

### Full Strategy Day

If the School's strategy is in need of a major overhaul, then a full strategy day will often be required which will include some preparatory work. The programme for a full strategy day might be something like:

- Introduction by the Chair of Governors
- Presentation 'Governors' Key Responsibilities and their Role in Setting Strategy' by AGBIS
- Introduction to the strategy session (Objectives / Methodology / Programme)
- Review the School's Vision / Mission Statement
- Governors' SWOT analysis – identify issues to be addressed in a new strategy
- Review SWOT analyses / questionnaires / survey conducted in advance of the day by:
  - Parent and/or pupils
  - All Staff / SMT
- Identify recurring themes and determine which require immediate staff action and which need to be embedded in medium to long-term strategic plans
- Agree decisions, actions and measures of effectiveness
- Review the proceedings and agree next steps

### Strategy Update / Review (Usually Half a Day)

If the School's strategy has been updated in the past two to three years, then a shorter full strategy update / review may often suffice. The programme for such a session, which normally takes around half a day, might be something like:

- Introduction by the Chair of Governors
- Governors' Role in Setting Strategy – brief refresher presentation by AGBIS
- Introduction to strategy session (Objectives / Methodology / Programme)
- Review the School's Vision / Mission Statement
- Identify and analyse key elements of the existing strategy:
  - Are these still relevant?
  - Has the strategy achieved the desired objective or is progress being made towards the objectives?
  - Does the strategy need to be amended or replaced by a new set of objectives?
- Agree decisions, actions and measures of effectiveness

- Review the proceedings and agree next steps

### Governing Body's Effectiveness Review

Occasionally the main thrust of away day is to gauge the Governing Body's own performance in the setting of strategy and other key governance functions. AGBIS can help develop a programme for such an event, which usually takes around half a day and might follow a programme like:

- Before the event – Governors complete the online AGBIS Governing Body Self-Assessment questionnaire
- AGBIS facilitator uses the results of the survey to develop a number of relevant discussion topics such as:
  - Bearing in mind the mantra “Eyes, on, hands off”, how would Governors rate their approach to governance (individually and collectively)?
  - How do Governors know how well the school is operating, and can they evidence this?
  - Is the information provided by senior management sufficient? What more or different information do Governors need from senior management, if any, to discharge their duties as Trustees and Directors?
  - What are the top three strategic challenges facing the School over the next five years?
  - How clear are Governors about the vision and mission of the school for the future and are these shared by the executive?
  - What are the overall educational priorities for the School for the next five years?
  - Do the plans for developing the infrastructure support the educational priorities?

### **Fee and Charges**

The charges for member schools for 2021 are £580 for a half-day session and £790 for a full day, plus an equivalent hourly rate for the time taken to prepare the programme (usually around 3 to 4 hours) plus all reasonable travel and subsistence costs if the training is in person. VAT is chargeable on the fee and expenses. For strategy days for schools outside the UK, a bespoke rate will be provided based on the appropriate daily rate, including travel time, plus all travel and subsistence costs +VAT. Where possible, we advise booking at least a term in advance. This service to member schools continues to grow in popularity and it is important not to leave the booking too late.

We hope this provides enough information for you to consider the benefits of an AGBIS facilitated strategy day. If you would like to know more about the subjects or have other questions, please email the Director of Training on [training@agbis.org.uk](mailto:training@agbis.org.uk) or telephone 07719 534999.

**AGBIS**  
**January 2021**