

**Recommended process for
developing a new mission and values**

Children's Day School

Why CDS is revisiting its mission/vision/values at this time

- Address CAIS Major Recommendation
- Refresh current mission -- adopted in 2004 and program has grown/evolved
- Confirm/align current assumptions about who we are and what we value
- Help guide future decision making
- Provide a community-building and -alignment experience
- Highlight key differentiators of CDS as other schools move closer in positioning
- Address the reality that millennials base purchasing decisions on an organization's mission/purpose

Desired outcomes

- **A mission statement that genuinely reflects what CDS is today**
 - Can act as a lodestar for decision-making
- **A values statement that all members of the community can identify with and be inspired by**
 - A traditional statement or perhaps a list of values: we are open to what will be most authentic to the community.
- **Evaluation of our vision statement** to help us assess whether it needs a refresh
- **Evaluation of competitive positionings**, by reviewing the communications of other independent schools and interviewing millennial parents of preschool students.
- **Preliminary direction for strategic plan**
 - To provide the “strategic scaffolding” for a more in-depth process at a later date
- **Facilitation of a transparent and open process** that gives all stakeholders a chance to have their voices heard and helps build an aligned community
 - Stakeholders are faculty, administration, board of trustees, staff, students, parents, and alumni.

Tactical consideration: Some coordination with our architecture firm (Jensen Architects)

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Definitions of terms

Vision: an inspiring description of how the future will look if CDS achieves its mission

Mission: what we do and how we are moving towards our vision

Values: core beliefs that inform how we educate, work together and relate

Phase I: Surface CDS's DNA through immersion & community inquiry

1. Review current materials: strategic plan, marketing materials, presentations for fundraising, whatever gives us a sense of CDS at its best

- Identify examples of missions from other inspiring educational organizations

2. Interview the people who understand and can best articulate CDS's DNA

- **Conduct 2 days of interviews with 12-15 people who have a deep understanding of CDS at its best** and are conceptual thinkers and strong communicators

eg, some combination of founders, faculty members who many would recognize as the soul of CDS, parents who are deeply committed to the school, lead administrators, a community partner, an adult alum, a current 8th grader

Meet to update overall learning/insights; discuss with JVS or MVV

Also, meet with architects to discuss our outreach to the community and how they can participate

Phase I: Surface CDS's DNA -- continued

- 3. Facilitate (3) one-hour listening sessions with faculty, administrators and staff during the March 11th professional development day**
- 4. Conduct (2) parent listening sessions, one daytime and one evening:**
 - Invite the community to attend
 - Provide a structure and some exercises to stimulate discussion
 - Ask how they feel about CDS, why they sent their children there, and what they most value
 - Which CDS values resonate most with them
 - Any concerns about how the school is changing
- 5. Conduct a student listening session with the middle school kids**

Meet to update overall learning/insights; discuss with JVS or MVV

Phase II: Develop alternate concepts and values

Based on Phase I, **develop a range of alternate mission concepts** and **draft values** to bring to workshop groups to give participants something to react to.

← Discuss with JVS or Mission Vision Values task force (MVV) →

Meet to update overall learning/insights; discuss with JVS or MVV

Phase III: Get community input on mission concepts and values

- **Hold three mission and values workshops:**
 - **Workshop 1: representatives of faculty/administrators/staff (they select the representatives)**
 - **Workshop 2: CDS board**

Outline of workshops:

- Provide “mini-tutorial,” definitions of key terms like mission/purpose, positioning, etc.
 - Share examples of inspiring mission statements to stimulate thinking
- Have them discuss and sort (as a group) a set of alternate mission concepts
- Get reactions and comments on values
- Revise concepts and values based on input and summarize learning

Meet to update overall learning/insights; discuss with JVS or MVV

- **Decide at this point whether the vision statement needs a refresh**

Phase III: Get input from millennial parents on positioning of CDS

- **Workshop 3: parents who have just applied to CDS for preschool:**
 - Explore what they were looking for, how they describe other schools they considered, and why they chose CDS
 - Share alternate mission concepts and get their feedback
 - Get reactions and comments on values

Meet to update overall learning/insights; discuss with JVS or MVV

Phase IV: Facilitate final decision-making

Conduct final work session with the MVW plus a few of the people who participated in the group who were “DNA” experts

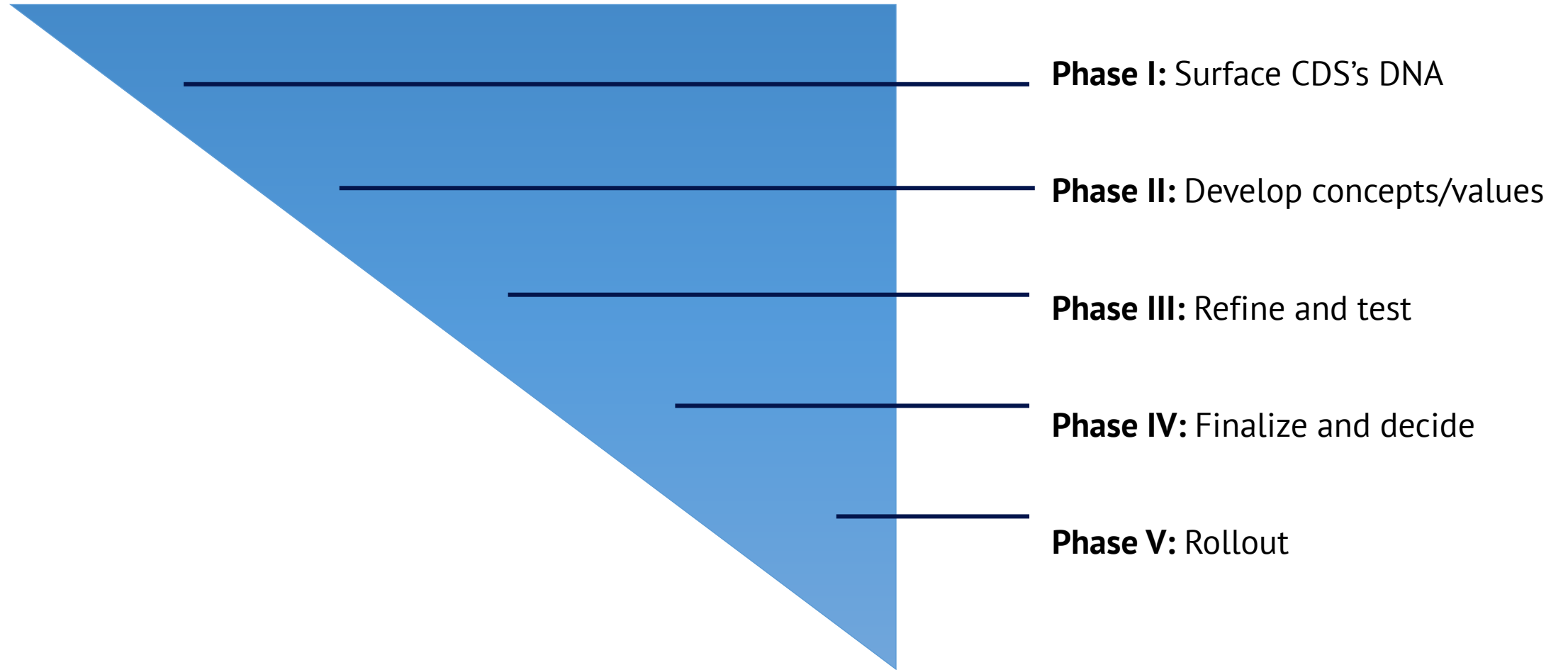
- Facilitate discussion of top mission ideas and make final decision
- Potentially, review vision statements options in the workshop
- Develop presentation summarizing process, rationale, final version of vision, mission and values, and any further implications or suggested next steps

Meet to update overall learning/insights; discuss with JVS or MVW

Phase V: Rollout

- **Provide direction for a rollout plan for CDS community** and a recommendation on how to update the mission and values section on the CDS website
- **CDS to develop the full plan and launch video**

Project overview



March> Sept

Project overview:

What we will do, timing, and key meetings with CDS

Gardner Rodriguez to manage:	timing	meetings to review/approve
Review materials	March	
2 days of interviews with stakeholders (12-15)	March	Review with JVS (Jeanette, Vivien, Shelly)
Coordinate with architects	March	
Conduct 6 listening sessions: (2) parents, (1) students, (3) faculty/admin.	March	Review with MVV (Mission Vision Values taskforce)
Develop alternate concepts and values statements	April	Review with JVS or MVV
Hold 3 vision and values workshops: (1) faculty/admin/staff, (1) board, (1) millennial parents	April/May	Review with JVS or MVV
Conduct (1) final work session with MVV + selected stakeholders	May	
Develop final recommendations and rationale	May	Review with MVV
Present final recommendation to CDS board, provide direction on the rollout	June	Board approval

G&R monthly fee
March \$20K
April \$20K
May \$13K
June \$5K

**Total GR free:
\$58,000**

CDS to manage:		
Develop rollout plan, update web site, create launch video	July - Aug	
Rollout to full community	Sept	

Timing

March – June 2019

Key deliverables:

- Mission statement
- POV on Vision Statement
- Values
- POV on competitive positioning
- Preliminary direction for strategic plan

Process requirements:

- An inclusive and positive community process
- Coordination with architects of master plan

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We work with clients who are breaking new ground and doing good in the world: emerging companies, inspired nonprofits and collective impact initiatives. We developed a powerful set of business and branding skills as senior executives with global communications companies (Foote, Cone & Belding) successful technology companies (Amazon, Adobe) and high energy start-ups.

We know how to bring people together and work to build momentum.

Recent success:

Strategists and momentum-builders for The Big Lift, a collective impact start-up to help low-income kids in San Mateo County read proficiently by third grade, funded by The White House Social Innovation fund and followed by policy-makers nation-wide.

Other relevant experiences:

University High School Board, Williams College Board, College Futures Foundation, California Competes, Silicon Valley Community Foundation, California Public Libraries, San Francisco Zen Center

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