

Monday, February 28, 2011. Ian Symmonds, "Major Trends and Forces Shaping Independent Schools."

MS. KELLY: Author, speaker, and consultant, these are just a few of the roles that Ian Symmonds enjoys. Ian is a visionary president and founder of Ian Symmonds & Associates. Over the past six years, he has served over 110 independent, schools, colleges, universities, and nonprofit organizations through enrollment, marketing, branding, and strategy counsel. I'm proud to say that Ravenscroft was one of those first schools in that early round, and Ian serves our school today in another round, helping us with strategy and counsel, and it's been important in this era to have not just what we feel is our gut, but significant data around making good decisions.

Long before consulting, however, Ian was a practitioner. His professional practice as a senior officer, executive director, and dean spans nearly two decades, including Pacific University, Culver-Stockton College, St. Mary's Hall, and Trinity University. He's one of the few highly successful enrollment and marketing professionals in the nation, experienced in recruiting and retaining independent school students, traditional undergraduates, and graduate and adult students. He led dramatic enrollment turnarounds for three private institutions during his career.

Ian has published in numerous professional journals, such as the Journal of College Admission (NACAC), and On Target for College Board, and has presented at just about every national and regional conference.

He holds a BS and MS degree from Illinois State University, in Illinois. He is in high demand as a conference speaker at regional and national venues.

More importantly, he lives in Portland, Oregon, with his beautiful wife, Lisa, daughters Makayla and Jules, and I'll let him share the scoop on the dogs, one of which is one of our auction dogs. So there's a story behind that: his irreverent labs.

Anyway, let's give a warm, hearty welcome to Ian Symmonds.

MR. SYMMONDS: Good morning. There is a story behind the lab, so I'll put it up right away. Five years ago, we went to the auction; right? And we left with -- not that night, but about a week later -- a yellow lab whom we named Rajah. If you read the book or you saw the movie, Rajah is Marley. And I'm not joking. Failed dog training like three times. We've taken him through every possibility. He just doesn't get it. He's got a mischievous -- kind of loving, mischievous kind of attitude. The worst part is, what were we thinking? We thought that if -- we were told by people who have labs -- how many of you have ever raised a lab? Yeah. Okay. We were told, You know what? He'll be less mischievous if you give him a partner. So we bred him, a yellow lab, with a chocolate lab. We were kind of hoping for the chocolate lab coming out, but we got ten black labs. We kept one of them. Her name is Rhani, so we have a black lab now -- that's his daughter -- and they pretty much just team up.

Actually, to be honest with you, my wife and I have come up with a phrase, because we're not quite sure that Rhani is okay. We think she's kind of special. So when people come over and they see this dog, they're like, "Rhani's kind of special." We think she has a little bit of ADHD and a lot of learning disabilities, to be honest with you.

But the long and short of it is, yes, I have two labs.

It is great to be here, see some familiar faces. I do live in Portland, Oregon. The truth of the matter is, I spend a lot of time on this side of the country. We have a lot of clients in the southeast, and so I spend a lot of time in this part of the country. So I choose to live in Portland. I'm not from there. I'm from central Illinois originally. My daughters go to school in independent schools in Portland, Oregon. I spend a lot of time probably in the southeastern and the northeastern United States because that's where a lot of private schools are.

I think you're going to have a really good time today. I am really delighted to be here. Initially, my wife had planned to join me, and she was not happy, as I was texting her yesterday and showing her pictures of the weather we had versus what she had in Portland, Oregon.

Today's talk is really a strategic view of major trends and forces that we see shaping schools, particularly independent schools and private schools and, in some cases, schools for girls. The slides from this session will be available to you on a PDF format directly following our session on our website. And we also will post a video cast. If you're more the type who just wants to watch it on line, we're videoing it, and you can watch it online, as well, and that will go on tomorrow.

Feel free to sit back and relax and enjoy the session. Then the last 15 minutes we'll spend time really focusing on question and answers.

Real quickly, just a brief history about our company. Before you read the slide, I need to tell you this. I never set out in a million years to be a consultant. Never. It was never the plan. As Doreen shared with you, I managed enrollment for schools and colleges, four of them. And what I really found that I enjoyed doing was walking into a new situation and kind of reading the tea leaves. What I found that I really liked to do was come in and kind of be a little bit of a research buff and a cultural demographer and kind of read the tea leaves, and then I would stop and say, "Wow, I have learned a lot, and now what does that mean for pushing this school forward?"

And it kind of got me into the business of doing some -- I wouldn't say enrollment turnarounds, but in some cases, yes, but kind of positioning turnarounds, helping a school get a little more clear about their vision and their strategy. The problem is, although people who have worked for me and continue to work for me say that I was a good manager, I didn't like to manage people, and perhaps you'll notice this anecdote better than anyone.

On my last job that I had, I went out to Portland, Oregon, to take the job at Pacific University, and I remember the last semester I was there, I actually chaired 11 committees. Do you ever have those days where you literally walk out of your office before 8:00 to go to the 8:00, and you have got a portfolio and your agenda, and you go from meeting to meeting to meeting, and most of the time it's the same people in the same meeting. You look around, like, "You were like at the last three meetings of mine," and the only thing that changes is the agenda. 4:30 comes, you go back to the office -- my wife once said, "I understand what your day was like, but when do you actually, like, work?"

I said, "I don't know, actually," because it turned out that while process is important in schools, I don't have that kind of patience anymore. So I have to tell you something. I have extraordinary patience for what you guys do. I really do. I can't do it. I decided to become a consultant, and I enjoy what I do, and we like to partner ourselves with schools primarily because it's what we're gifted at. Our services span the horizon, including research, strategy, marketing, positions. We do head searches, enrollment management and campaign counsel.

I live in Portland. We have an associate in Seattle, and if you look at our website, you'll see another guy with the name Symmonds on our roster. That's Jack Symmonds. He's not my brother; he's my father. My dad works for our company, as well, which is a great gift, to be able to have an opportunity to have your father work with you. And he offices in Illinois, right where I grew up, in Galesburg, Illinois.

We've worked with a lot of independent schools. Our practice, just so you know, is about 144, 145 schools and colleges now. If I had to break it up, it would be about 60 percent are independent schools, about 30 percent are private colleges, and about 5 or 10 percent are unusual projects. I would say projects for nonprofits. How many of you went to NAIS and saw Jeffrey Canada speak? Okay. I came from Huntsville, Alabama, just two days ago, where Harlem Children's Zone, Jeffrey Canada's project, is being implemented in Huntsville, Alabama, of all places, and we're trying to develop the strategic plan for an organization called Village of Promise. Their vision is to eradicate kind of the structure of systemic poverty.

So I get involved in kind of interesting issues. I have a heart for child abuse. On occasion we get involved in projects relative to child abuse, as well. But the majority of our work is small colleges, and independent schools. And then on the girls' school side we work with some pretty good schools. This is a small roster, but Holton-Arms, Hutchison in Memphis, Girls Prep in Chattanooga, Forest Ridge out in Bellevue, Washington, and Roland Park in Baltimore, as well.

If you want to get information and download our files, we are going to send this file to Bruce. I'm sure he will send it as well to you. But if you want to, you can go to IanSymmonds.com. That's our website. You'll actually hit this logo. Just click it, and it will take you into the website and then click on the conferences and presentation format. This is not a shameless plug. This is actually good use for you. If I were a head of school or a high-level administrator at an independent school, I might be looking for resources all the time. There are two things that I think you might want to check out on our website. If you go to the presentations section, if you click on "Presentations," you'll see this presentation, as well. But there are also some really great white papers, if I don't say so myself, that you might want to take a look at. And one of them, one series we're going to borrow from today, and that is, about seven or eight years ago, I started thinking in my own mind that we're living kind of in an inflection point in our own society, and that we're dealing with massive change; right? And at the end of the day, I started thinking, You know, I think we're kind of dealing with cultural shifts right now.

We started writing a series called Ten Trends, ten major shifts and trends in impacting schools and colleges. And they're actually quite good, and actually very short to read, about three or four pages, themselves, but they're very, very good from a strategic perspective on independent schools. That's one you might be interested in.

But the other is, as I started working with especially boards, during strategic planning efforts, I noticed that a lot of times we will use some offline reading. I should say, it used to be ten or fifteen years ago if you did a planning effort -- how many of you have done this? You do strategic planning, and if you wanted to get your client kind of pumped, you might give them a book or two to read, right? And the book would -- maybe some would read it, maybe some wouldn't. But we kind of realized that today, in the generation that we deal with right now, all that information is available online and much of it is in video format.

So I'm a big fan of TED Talks. How many of you know TED? Yeah, I like TED a lot. TED Talks is really good. So what we did is, we started building something that's just basically a virtual online repository of all the great speakers that I think that are thought leaders around strategy. So the Malcolm Gladwells of the world, the Seth Godins of the world -- they're all on this page called The Lighthouse. And if you ever want to find a video quickly and give it to your board and say, "You know what, you really need to think about this," or, "This will really mean something to us," that's a good place to go. It's got about 50 videos on it right now, and we add to it all the time.

All right. On to the good stuff. "Look both ways." Good theme for the conference. I think it's great to think about it. I like the theme of looking both ways because when I think of looking both ways, what I really think about is internal and external.

How many of you are familiar with the SWOT analysis? SWOT stands for strengths, weaknesses, opportunities, and threats. Well, the SW in SWOT is really about the inside. It's the inside of the organization. The opportunities and threats are really about the outside of an organization; right? Now, here's one thing I know. Tomorrow my sixth-grader Jules will turn 12. Very important for me to get to Portland tonight. Okay? Do not delay me on my quest to get to Portland tonight. I'm teasing, but the reality is: My goal is to get to Portland, Oregon.

Now, along my journey, there will be some things that I don't get to control. As Burch said earlier today, she didn't get to control the one inch planned precipitation in Boston that turned into a snowstorm, right? Or the de-icing. You get curve balls along the way. You don't get to control your curve balls, the external side, but you

must respond to them. Okay? Very important piece.

And so we're going to talk a little bit about internal, some things we have learned about working with schools and colleges that you can control, but we're also going to talk about some external things, and we have ten on each side.

Now, the truth is, to get through 20 major trends in the time allotted means I'm going to go fast, really fast. So take notes, if you want to, or just listen in. The last 15 minutes we're going to do question and answer.

Now, this is a really important note. You all work for what's called a mature industry. You understand what I mean by mature industry? Actually, if you go back in time, there are three really mature industries: The church, the school, and the government. Turns out they were here long before any of us planted our seed, but they have been here since the beginning of America. Okay? It actually turns out they don't like change, all right? They are change-resistant. This is the one that cracks me up. Now, why does tenure exist in colleges? Well, it initially existed so that people would have freedom of speech; right? And they could follow intellectual inquiry without losing their job; right? Well, okay. Fair enough. That's good.

The challenge with that, it actually turns out that that model is kind of crazy. How many jobs, how many industries, do you know that you can actually get a job for life, like you actually can never get fired from it? Let me on that. I'd like that job, actually, because every single day I work, I know I'm accountable for what I have to do. What I'm trying to say is, you'll notice, if you look at the education sector, and also the church sector and government sector, they're very resistant to change. Changes in small steps, and there are very consensus-based organizations. They're not interested in making a profit. They're interested in making a difference. All right?

Peter Drucker, famous management guru, divided America into three sectors. He said it was a government sector, a corporate sector, and a social sector. You work in the social sector. What's the purpose of the corporate sector? What is the public purpose? To make money.

What's the purpose of the government sector? Don't say, "To spend money." That's usually what comes out next. But it's to manage and do policy.

What is the purpose of the social sector? It is to transform lives. You are not in the business of widget-making or gadget-making. You're in the business of changing people's lives. You do that through education; right? That's the way you do it. The reality is, that sector doesn't change very fast. It's a long, old industry.

So the reality is, you have structures built into your system. I don't need to tell you this. They are kind of designed to maintain the status quo. Today I'm going to give you the picture from 30,000 feet, all right? I'm going to try to describe what I see from the internal and the external, from 30,000 feet, and hopefully you'll take something away from this, and it will be useful. All right?

Let's talk about internal trends first. I think internal trends will be a little bit easier for us to notice. And I want to tell you something that I have learned from consulting. How many of you have dabbled in consulting before? Okay. How many of you go to three or four conferences each year? Almost everybody's hand is up. You know what the amazing thing about consulting is? You're a prophet from afar, right, because you got on an airplane and you have a ticket, people think you know something more than they do. But sometimes it's hard to be a prophet in your own land, right, but you go away to a conference and you learn something from some of your other professionals. You pick up things, and you can apply them. How many of you have ever gone to a conference or have consulted on a project and you picked up something really amazing and applied it in your own school? Right? Do that 145 times. 145 schools and colleges and nonprofits we've served.

I'm convinced what makes a consultant good is not themselves; it's their client. You learn stuff. If you were on

two or three school campuses a week, if you had the chance to work with people like Doreen Kelly, you'd pick up what's working. You really would. Your clients make you better. And so one of the things I'm going to point out today is some themes that we notice inside the school, and some of them aren't the most positive. So if you have a thick skin, good. If you don't, sorry. Okay?

Internal trend number 1. I don't think independent schools are very data-driven. Lots of decisions get made on hunch and anecdote, oftentimes at the pleasure and the whim of the current board chair or current board of trustees.

Here's an interesting finding. We have worked with lots of schools and lots of colleges, and we have yet to find an answer to this. So if you get it, tell me. One, we've never worked with an independent school that has a director or a function called institutional research. One job or one office whose actual sole purpose is to connect all the data systems like PeopleSoft or CARS or Datatel or whatever you're running, Blackbaud, and data mine. Find out why people make the choices that they do. We have yet to work with a small college that doesn't have a director of institutional research. Colleges don't make decisions without funding. They don't make decisions without seeing the data that points them in a particular direction. They just don't. And so I have kind of drawn the conclusion that we make a lot of decisions by anecdote.

When we start working with a school, we learn a lot in literally the first two or three weeks of working with them. We send on to them our data requests; right? "Here are the things that we want from you." Boy, that's a slippery slope. If they can provide them all, it's like a really big deal. I'm like, wow, they have got their act together. More often than not, it's like, "Hey, we don't track this, or we don't have that report, or we don't have these."

I'm like, "Really?"

Or getting them to import data out of their systems. How many of you use more than one main information system on your campus? Right. I'm convinced in most schools who really get it, they have four or five systems at work, but then there's a guy in the back that has an abacus in the back room and he's moving all the levers.

But I want to tell you a quick story. This is what I mean by data-driven decision-making, and then I'm going to move on. This is a college corollary. When I was at Pacific University, we learned something really valuable about incoming freshmen. If any of you have ever worked at the college level and you're thinking about residential students, students who actually come and go to college, at a college campus in residence, here's what you'll learn really quickly. The national research about retention says that a student will be made or broken -- they will either return or stay at that college -- within the first six weeks of school. The first six weeks, everything happens.

You know what they have to have? The research says they have to have three things. This is it. It has nothing to do with academic ability, believe it or not, because they were admitted; right? The first thing is: They have to have a meaningful relationship with a student that's not their roommate. They have to have a friend. That's why athletes retain better than nonathletes. They have a set group of friends.

Second, they have to have some idea, some clear idea, of why they're there, like an interest to get involved in, some sort of club or activity that's beyond the academic piece.

And third, they have to have a meaningful relationship with a person, an adult, faculty member, an advisor.

If those three things happen, guess what, they're staying. They will make it through. So if you're sending a kid off to college soon, those three things you should be asking on the phone or on Skype or text message. Who would have ever thought we'd give our kids talking devices and they'd actually never talk on them? But that's a different topic. But that's what you want to be asking, not how are your classes going, but those three things.

So guess what we did at Pacific? That stuff is kind of predictable. We actually created what we call an SOS group, and we brought together on the very first day of school -- I'm going to just kind of shout it out here, I'm going to use some of you as examples -- the key people who have data available to them about this.

So Clayton, you are the director of financial aid. I want you to bring to me every single person who had the widest gap in their financial aid package on the first day. In other words, difference between cost and their ability to pay. Okay?

Colleen, you're the director of admissions. I want you to bring to me every single person that was admitted under the boundaries of admission, that got admitted on probation, or by committee, so they're on the bubble, if you will, to make the big party.

Denise, you're the finance person. I want you to bring to me everybody who has passed 30 days on their bill, okay?

Doug, you're the residence hall director. Yeah, sorry. I want you to bring to me everybody in the first week of school who's asked for a roommate change already.

Brad, you're the dean of students. I want you to bring to me every single person who has gotten in trouble in the first week of school.

Okay? You see where I'm going; right? Guess what? They're all the same people. They're not plugged in. It's predictable. You can make a roster from the very beginning of school of who is not going to be successful.

And then guess what we did? We put them all on a white board and figured out who has the best connection to John or Sally and we created a very specific strategy on how to retain that kid.

This stuff is noble. Schools work on a nine-month cycle. There's a life cycle. Don't study student satisfaction or parent satisfaction during spring break. Nobody's satisfied with their school during spring break. Right? Nobody likes it. Right? This stuff is very predictable. Being data-driven is about asking good questions constantly and going where the data tells you. I don't think independent schools are very good about it.

Financial aid, it turns out, is a very important thing for schools, right? And I'm not convinced that we're using financial aid very strategically. How many of you doubled your financial aid budgets as a result of the financial debacle and had most of that doubling of your aid focused on existing students? Right? That's the reality of it. Most schools we work with severely increased their financial aid, and they had to do so in an effort to retain students. The old adage of it's easier to retrain an old student than recruit a new one is true from an enrollment standpoint.

So I just have to ask you: Do you have priorities established when you use financial aid? Because what I'm noticing about schools is we're not particularly strategic about how we use aid. Okay? I want to make a very important distinction. For those people who have seen me speak, this is going to be a yawn. If you're a client, you have heard this a million times. But if you haven't, there are a couple axioms about working for private schools that you need to know. One is your financial model.

In the world of schools there are two kinds: Public and private; right? Publicly funded and privately funded. What's a home school? Privately funded. Right? Public or private?

In the private school world, there are two financial models: Tuition-driven and endowment-driven. Raise your hand if you fall into the tuition-driven category. That would mean 80 to 90 percent of your operating budget comes from tuition and fees. Okay. You are using generally what's called as a net tuition revenue model. You

don't have funded aid.

When I was at Trinity University in San Antonio, we had a \$650 million endowment for 2,000 students. Today that endowment is a billion. Every single dollar we spent in aid was funded. That means when you send your child to Trinity University and they are full need and I give them \$35,000 in aid, guess what, they're still a full-pay student. It doesn't affect our bottom line or our budget at all. That's endowment-driven.

Here's the deal. Tuition-driven versus endowment-driven. There is a really important point. You know the adage for real estate, location, location, location? For independent schools, it is endowment, endowment, endowment. They'll go out and try to get an endowment because they're actually hard to build, and part of it is a lot of luck.

But here's the one axiom that I think people forget. If you are endowment-driven, demand is a no-brainer. Inquiries, applications and visits just come to you. Think about it. If you've got the resources, you don't need to recruit. When I was at Trinity, I thought we were pretty hot. I was recruiting up and down the mid-Atlantic, up into the northeast. I was up at a boarding school affair in Maine and I noticed that my good friend at Rice University, who normally traveled in these same circles, wasn't with me.

So I got back to my office later, called him, said, "Hey, I noticed you didn't go to the boarding school affair up in Maine. How come?"

"Well, it turns out we got too many applications from there last year, and it doesn't seem to matter whether we go there or not. We just -- applications come."

I'm like, "Really?"

Because I was kind of sweating behind the table trying to pass out inquiry cards. My point is, they had a \$1.5 billion endowment. Rice was actually free at one time in their life, if you could get in. So the reality is: Endowment generates demand.

If you're tuition-driven, your endowment is manufacturing interest. It's all about inquiries, applications, visits. Your website needs to generate that. You've got to be able to push interest.

Take the dean of admissions at Duke University and put them at -- I'm trying to think of a smallish -- put them at Goucher College. They'd last three days on the job, because their job has all been about selection. The job at Goucher is all about recruitment. Okay?

This whole point now -- I'm going to get back to the aid piece. If you're tuition-driven -- and almost all of you raised your hand -- and you are using unfunded aid, right -- that means when I fly away today from Charleston to Atlanta, Atlanta to Portland, if there are seats on the plane that are unfilled, that plane is still going to fly, right? They're better off selling those seats at \$20 than nothing if they could find the customer. Right? That's called net tuition revenue or net revenue models. That's the model you guys function by.

What I'm noticing when I work with schools is that most schools don't understand how to use their aid strategically. So I'm going to posit three ways you need to have your priorities. This you might want to write down. It took me 15 years to figure this out. You should use unfunded aid to do one or two of three things, and you need to know the rank order. One is to shape your class. We want more athletes, or we want more scholars, or more redheaded stepchildren. Whatever it is. Okay? You get to choose, if you're an independent school.

Two, for access to underrepresented populations. Probably the most noble reason, you decide.

And three, what do you think the third choice is? To fill unused capacity. If you don't have to add a dollar to the bottom line, then you can bring a student in. Delta would be smart to add those last seats to the plane, because last time I checked -- hope they're not pulling the wool over my eyes -- they're still going to have two pilots, I hope; they're still going to gas up the plane, I hope; they're still going to run radar, I hope. Those seats are unfilled. Right?

Now, net tuition revenue works up to the point of capacity. Once you get past capacity, it's a law of diminishing returns. Then you have to add expense to fill that, so you have to keep that in mind. So net tuition revenue is a real key.

But those three that I listed -- access to underrepresented populations, shaping your class, and filling unused capacity -- I have seen very few independent schools who know exactly what they're trying to do with their aid. They're just spending it. They're spending it. You have to have those really clear in your mind.

I'm taking longer than two minutes on each point so I have to get going faster here.

You probably haven't experienced this at all. Again, I don't have the patience that you all have, so I appreciate this. But I will tell you that one of the things I see over and over again internally is boards that have improper hover height. They just don't understand. And one of the things that gives me a unique perspective on this is that we work with a lot of colleges. Colleges' boards only usually meet three or four times a year. That's it. And guess what? They're not from the market there. They're not on the campus. They actually are flying in.

My favorite that I'm working with right now, one of the most strategic schools that I have ever worked with. How many of you know who Bridgton Academy is? Check out this positioning concept. They're over 100 years old, the nation's only all-male all-postgraduate boarding school. That's it. So you start the year with 185 students, and you end the year with zero, and you have to start all over again. And if you know much about admissions decision-making, boys make decisions later than girls. Weak academic sports-minded boys make decisions like really late. So if you have ever talked to a boy who thinks he's going to get a scholarship, especially a spring sporter -- talk to a high school male baseball player. Here's the way their mind operates. "Yeah, I'm going pro, they're going to call next week."

And then it's, "I think I'm going D1. I think it's D1 for me, probably go to an SEC school."

"Yeah, I'm going NAIA. I think I'm going to an NAIA school."

"I think D3 is where it lives for me."

"Okay, nobody's calling, so community college sounds good."

And then Bridgton steps in. They have an unpredictable budget. Imagine sitting around, you have no re-enrollment. Imagine sitting around in July, "Well, we got like seven guys that are coming next year. How do we make our budget?"

They end up with 188 kids every year, but it's the nature of their beast. Their board, though, doesn't get trampled by this. They meet four times a year, they're from off -- that's a term I heard from Jill Muti about Charleston, by the way. They're not from there. And they understand that, hey, it's all going to work out, and they see themselves at the 30,000-foot level.

A lot of problems we see with day schools is that the board members are actively involved, sometimes too many hats, they're parents who get involved in knowing too much about the school, and then they have their own agendas.

I know you deal with this on a regular basis, but this is something we see kind of rampant. The solution I have for you is, bring somebody in to help them, if you deal with this, to really elevate their thinking. Board members have one employee. That's the head of school. And they really are only supposed to be dealing with issues of policy and finance, and hire and fire a head. That's it. If they're working any level below that, you've got a problem. You don't deal with that at all at your schools, do you?

The problem is, you can't call it because of where you sit. That puts you in a very difficult situation.

Here's the next one I really want to talk about, and that is this board structure. I have to give you quick background. I was working with the Bush School in Seattle. I don't know how many of you are familiar with Bush. Really interesting school. Love it to death. And they really kind of get it on what a proper structure is. We built a strategic plan, and that strategic plan had five major goals. Most strategic plans have five, seven major goals. So they built this plan, we built this plan, and then the board chair comes to me and says, "How do we get the board to work on this? Because we have like 11 subcommittees. Committee on trustees, committee on finance, student experience, academic program."

We started talking about it and Walter, the board chair at the time, says, "I have got a great idea."

"What is it?"

He said, "Why don't we just restructure the board around these five goals and strategic plan?"

And what we end up doing is having like, you know, a board chair, an administrative co-chair, and they kind of partner as a liaison relationship, and then we populate the rest of the committees, rather than having overlap. I'm like, Wow, that's a really good idea. Let's do that. The only committee they kept was the committee on finance. It's going to kind of manage the fiduciary responsibility.

They have got five committees. That's it. They're the five goals of the strategic plan. And that makes sure, that ensures, that the plan stays in front of the constituency at all times. There's no deviation from the plan. Pretty amazing. We see too much overlap, like duplicity of effort. You've got board committees, you've got subcommittees, you've got ongoing committees, then you have a plan with five goals. You don't have the capacity to pull off all that. Most organizations can focus on three or four things at a time. Make it simple. Streamline it. So I think board structures need to be kind of revisited.

This is one concept that's really after my heart and hopefully it will help you, but we've not found that most independent schools and private schools in general have a clear positioning strategy. And by positioning, that means they really have taken a look at the marketplace, and they have really decided, here's the gap that we can fill. Okay?

Any great organization starts with a really clear vision and a really crystal-clear positioning strategy. Do you know what Google's vision statement is, by the way? The reason why I bring them up is because they're scarily close to actually achieving it, which is really crazy, but it's "To organize all the world's information and do no harm in the process."

They want your spreadsheets, they want your documents, they want your e-mail, they want your calendar, they want your transactions, they want your searches, they want your videos. Say "hi" on YouTube, by the way. They're not trying to really do anything with it except make it accessible, right? Their positioning concept is what? Ubiquitous accessibility. That's their gig, right? That's what they're about. That's all. And hopefully they'll make some money along the way.

My favorite? Southwest Airlines. By the way, I don't like to fly Southwest Airlines. It wasn't a plug for them. But who in the world would have opened up an airline in the middle of a fuel crisis and in a state that already

had three hubs? Texas. Delta was still a hub at DFW. American was there, and you had Continental at InterContinental. Who in the world would start an airline? Guess what? They weren't trying to get flyers from other airlines. What was their competition? The automobile. You couldn't fly in Texas point to point. I lived there for ten years. It's true. Until Southwest came along, you couldn't fly Austin to Amarillo. You'd fly Austin, Dallas, Amarillo, or Austin, Tulsa -- crazy enough -- or Oklahoma City to Amarillo.

They created point-to-point service. They were the one that decided: Our competition is not a plane. It's the guy that's driving from El Paso to Galveston with a clothes rack in the back of his car. That person actually existed. They were everywhere there. They saw the opportunity, the gap of service.

You really have to keep in mind how you are trying to position your organization and what that means in terms of filling a gap, because once you fill the gap, it makes every decision easier for you.

Southwest flies one plane. Not one plane, but one kind of plane. Did you ever notice that? Why is that? Cheaper. Their processes are all about efficiency. We've got one pilot to train, one type of replacement. By the way, if you notice, when they try to take over a market, they don't go into the major airport, but they basically try to own the secondary airport. Houston Hobby, Dallas Love Field. Those are basically Southwest terminals at this point. Brilliant. Why? Because they're not competing with the airlines. They're competing with the car. Positioning is key. Got to have a positioning strategy.

Is this helpful, by the way? Getting something out of this?

Lack of integrated marketing. Tell me real quickly, what color is Best Buy? Blue and yellow. If I get a mailer, is it the same as what I saw on the TV or the web or their sign out front? It's all the same, right? That's called integrated marketing. No matter the medium, the message stays the same.

How many of you have different vendors that produce your website versus who does your print media? They're not going to be working very well with each other. Okay? You're going to get deviations in message. Everybody wants to have their own thumbprint on things. You have to be crystal-clear about what your message is, and it's got to look the same, no matter what medium you use. So I'm not going to advocate whether you should spend more money on web or print or whatever, but what I would say is, if you got a good message and you think it's pretty clear, use it the same in every medium you use. That's called integrated marketing. Best Buy is a good example.

This is scary, to be honest. This is called "Where is the vision?" There's a difference between mission and vision. Okay? So I really want to point this one out. 80 percent of independent schools that we work with have a mission statement when we work with them in planning, but they do not have a vision statement. And these two things -- I'm going to use a double negative -- couldn't be more different. A mission is defined as your reason for existence. It doesn't change much over time. This is why we were founded. You can change your mission statement, by the way, without changing your mission. You can always change the language. But it doesn't mean you're changing your mission.

A vision, though, is very different. A vision is a successful completion of your mission rendered in terms of contributions to society. This is what it looks like if you're successful at achieving your mission. Google's vision to organize all the world's information and do no harm in the process. Southwest Airlines, to open the skies. That's their vision statement. To open the skies. 80 percent of independent schools that we work with when we show up do not have a vision statement. They spend so much time navel-gazing on why they were founded. Folks, that's not where the action is. That's looking in the rear-view mirror.

Vision is critical to formulating strategy. If you don't look forward, you're not going to be able to formulate strategy. 80 percent of the schools we work with don't have a vision statement.

Now I'm going to give you two vision statements that I think are really important. All right? If a vision is a successful completion of your mission rendered in terms of contributions to society, think about this. When Martin Luther King gave the "I have a dream" speech, that was a look, an example, of what it would look like if mission in life were successful.

Now, if I went just across the street, went down maybe to the market and walked up to ten people, and let's say I talked to five tourists and five employees, and said, Hey, did Martin Luther King achieve his vision from "I have a dream"?

Some would probably say, "Oh, yeah, absolutely." And the metrics they might say would be, "Hey, you know, we have an African-American president." They would point to metrics that would say he achieved his vision.

But another five might say, "Not even close. We're not even close to what he had in mind."

That doesn't matter. What matters is if he would have never given the speech. Because the speech is what propelled people to move forward. People have to be attached to something bigger than themselves. If you're going to work every day and your work is just to fortify the mission but not something bigger than you, you're not trying to get after something -- and Peter Drucker would tell you, if he were still alive, vision is far more important than mission in terms of getting people to work for something, because it's got to be even bigger than you. It's got to be more than what you're doing as an organization to propel people.

Good test? How many of you remember the famous movie *It's A Wonderful Life*? I call it the George Bailey test. Imagine for a minute that your school never existed. You drove up tomorrow and it was gone. It actually wasn't ever around. Who'd be the big loser? The current students, faculty, and staff, or your market overall? It needs to be the other. Okay?

George Bailey saw what happened if he would have gotten on that train or in that car and not fixed the bank, right? Pottersville turned to pot, right? I mean, that little guy changed the trajectory of a city, didn't he? Right? Literally. I mean, he went to the bar, "Oh, I wouldn't want to hang out with those people." He was about ready to kill himself, because he couldn't believe how bad the town was; right? That little guy, in his existence, made a difference. That's a vision. You got to have one.

So ask yourself, do you have a vision?

If I had a dime for every person that told me, "Gosh, if we just communicated better and marketed better, we'd have more students," I don't believe it. I don't believe it. I actually am convinced at this point in time that most of the schools we work with need to focus more on better product and less on promotion. If you know the four Ps in marketings, they are product, price, place, and promotion.

Promotion is merely telling your story well. You do need to tell your story well. But I'll go you one better. It's more than telling your story effectively. It's about having a really good product; really, really a product that no one else can get.

Apple is selling a lot of computers right now. Why? Not because of those clever ads. They are clever, okay? Basically, they're saying an Apple guy is like cool and hip and fit and kind of multiethnic. And it's all good, and if you are a PC user, you are a slightly overweight, slightly overtraveled, bumbling idiot white businessman, right, who freezes up all the time. I'm being serious. That's what they're trying to say, the end user of the product.

But the reality is, that's not what's selling products. They're selling products because the products are good and they're easy to use.

Number nine, client centric. If you know much about marketing, the definition of marketing is all about the end user. It's an exchange of values. A good marketer understands his audience. And the audience is who makes the decision. So in a marketing sense, you need to know everything about the decision path of your families.

Now, there's a good paper on our website called "Why Parents Choose Private Schools." Sounds like a simple read. My statistician in our office pointed out to me last May, she said, "Ian, do you know that actually all these web surveys we've done, we've actually surveyed over 20,000 private school parents?"

I'm like, "Really?"

She said, "And you know, there's like lots of common questions we've asked."

I said, "Great. Well, let's go forward and data mine."

We produced a paper on some common reasons why people make choices, but those aren't unique to your school. They're unique to our client base. I have found that most schools don't really know why people make the choices to come to their school, and therefore, their marketing messages are not client-centered.

Number 10, there's a lot of navel-gazing that happens at schools, and a lot of introspection. When you get ready for accreditation, what's the first thing you do? Self-study. We're going to study ourselves some more. The long and short of it is, what I'm trying to say in this particular topic is, most schools think what is really special and unique about them sometimes isn't the most special and unique pieces. There's more than meets the eye. Okay? Trying to really find out what is special and unique about your school and focusing on that is really, really critical to the marketing message.

Now, I'm going to flip the cards here and I'm going to go rapidly through my external trends. I have got very little time left, but I really, really want to get to these. Byron Hulseley at the Randolph School -- I don't know how many of you know Randolph School; it's in Huntsville, Alabama, a great school. He is the first person I have ever heard articulate this well as a head. But he says the biggest strategic issue facing private schools today is understanding what their public purpose is. We do these opinion leader surveys and we ask people, "So how do you know school XYZ," Holton-Arms or Hutchinson School?

And they'll say, "Well, it's an elite school. I don't know much about it. It's not very connected to the community."

There's a sense that private schools just don't generally have a public purpose. Private universities generally do. They generally have overcome that. But it's kind of this issue of relevance, like, what is your public purpose?

I find that this is a really challenging issue for private schools, because when I drive out of my neighborhood every day and I take my kids to school, in Oregon we have these little shelters where the buses come, because it rains a lot there, it turns out. Actually, it does rain a lot in the wintertime, and they just kind of sit under this area instead of having an umbrella. It's the same kids my kids were playing with in the street last night, and I realize every single day I'm the one that's making the odd choice here, not them. They're staying and going to the local public schools. My kids are going to the private school. So how do schools reconcile an existing population that kind of opts out of mainstream culture? They have got to figure out a public purpose.

Going quickly, this is a topic near and dear to my heart. I wrote a paper called "Power to the People" about, I don't know, three or four months ago, one of our ten trends series. But it's a really important piece. I really want you to think about it for a minute. It used to be that the Academy owned information and that the way the Academy delivered it was through the sage on the stage, right? You understand what I mean by the Academy? And this notion that information was available only if you went to the small college or the private school of

your choice, you would have to be able to gather this information quickly, but they would give it.

In today's world, most everything that you're teaching is available online. Right? I mean, most everything that you have available is available for free. So the question is starting to become, if you have noticed, if the Academy is no longer the sole provider or proprietor of information, how do you decide to charge for it anymore? Do you understand what I mean by that? There's a lot of kids that are going to school today as homeschool children, that their content is available completely online and for free. I mean, literally for free. So the whole concept of it is: What is your value added as a school? And how are you able to take that value added to people and make them basically afford a proposition that is becoming more difficult to afford?

Let me stop on time. We've got five minutes. I'm going to cover, let's say, two more trends and then I'll take a few questions.

There is a sense within mainstream society that the church is having a bit of a shifting role. I don't know if any of you have read up on any of this, but in America, the church is starting to see a little bit of a shifting role in our community. If you have not done the research, and even though I'm in South Carolina, in the deep south, when I say this, across the country, mainline denominations are kind of going downward in terms of their attendance. Church attendance generally is going downward. The era of the big megachurch which we saw emerge in the 1980s and 1990 is kind of going downward. You might say, why do I mention that?

I think church in general has been a mainstay in our community for a long time. But it seems to be -- it's not a commentary, it's a fact -- a less important fabric of American life. The question I have then, is -- and Doreen and I have talked about this -- if church is becoming slightly less important in people's lives, what does that mean for schools? Do you end up doing surrogate responsibilities for people who are not being a church? Do you find yourself ever feeling like you're more of a pastor as a head of school, delivering some level of counseling than you are something else? Because it has a ripple effect.

My last trend. Has this been good for you all? My last trend is the sage on the stage. You all know the concept, right, probably heard it, but it used to be that people in America believed the only way to deliver content was for the person that was teaching, the faculty member, to have the knowledge and impart the knowledge in a transmission process to the student, and then test the student on whether or not they got the knowledge. But it was the sage on the stage that produced the learning.

That concept is based on the Carnegie unit. Do you know what the Carnegie unit is? 120 to 124 hours it takes to graduate from college. The reality is, 124 credit hours means seat time in class. Did you know that there is no research that supports that seat time in class equals learning? There's none. But yet our tuition structures, graduation requirements, everything are based on seat time in class. I'm like, wow, that's pretty interesting.

So the role of the faculty member -- and I know you all are all in this -- but this is a moving target, isn't it? The role of faculty member in the independent school, the school of tomorrow, is rapidly changing. Rapidly changing. And what it will look like in the future, I don't know. But it looks to me like it's not going to be so much the sage on the stage. I think some disciplines lend themselves more than others to this in terms of this.

I'm going to stop. There are actually five more beyond this that you can see online. I have tried to deliver a ton of concept in a very short period of time. Has this been helpful? Good information? My biggest job is to wake you guys up this morning.

All right. I will entertain two or three questions real quickly.

MS. KELLY: Please use the mics.

MR. SYMMONDS: Yes, there's mics. If there's a question you'd like to ask, I'll be more than happy to answer

it.

MR. PAULUS: I'm Tony Paulus. I thought about this. I wasn't sure whether I'd have the opportunity. If you'd comment on a scene that occurred for us Friday night. We're at a gathering with our kids and some of their friends, and a very good friend of ours, who has founded five companies in Silicon Valley. And his style of communicating is to lecture. And he was upset that night because all these kids weren't listening to him. And these kids were really interesting. They worked at Google, Facebook, they had parents who had headed NBC, one that had founded "Lost," et cetera, and I just felt that night I was in a room where there was a major paradigm shift. I could have gotten depressed if I overidentified with one of my best friends, the lecturer, but then I realized we're responsible for all these 20-something folks. And I said, that's truly exciting, because the conversation they were having was so exciting, so forward-looking, I just wondered if you'd comment on that.

MR. SYMMONDS: Right. I think it's a very common thing. There are major shifts generationally in terms of how people communicate and how they decide to work on problems together. But one thing we know for sure is that this generation that you're referring to that wasn't listening -- they don't want to be talked at, at all. It's all about dialogue. Everything is about dialogue. So a good facilitator in a conversation like that is going to ask questions and lead kind of from the back rather than from the top.

So I have seen that scene a lot. We spend a lot of time on college campuses. You see it all the time. The really successful faculty member understands it's about collaboration and facilitation, and they'll kind of back themselves into solutions. But it's always going to be about dialogue. These kids have been marketed to forever, and they have also had a lot of constraints put on them. They're tired of it. They just want people to connect with them. Yeah, you're dead on.

Any other questions? Good question.

SPEAKER FROM THE FLOOR: You spoke of Google and its mission. How do you, as a school, know the limits to which you can go and to which you can't go?

MR. SYMMONDS: That's a good question. A really good question. So I think a good vision -- not mission, but a good vision -- finds the intersection between what you're really good at, like what your mission is, and what you have credibility in, and what the world needs.

And so as you're looking at what it looks like to be successful at your mission and what you can give to the world, you have to find credibility that actually works for your school but also, at the same time, the world really needs it.

I'll give you a quick example that might hit to the heart of this. They didn't actually accept it, but we were working with Columbia College here in South Carolina about four years ago. And I don't know how many of you know Columbia College. How many of you are familiar with Columbia College? It's a great school. Found out when we were doing all other market research that they're really good at being a single-gender all-girls' school, that we were working basically with women who were doing their graduate work or their undergraduate work in nontraditional ways, online, evening, weekend studies, that sort of thing.

What we found out is, their basic story was: This place gave me a chance to live a second life, a new life. Like for the first time, I'm going to be a director, rather than a minimum-wage employee. A lot of these women were first-generation collegians, they were getting a first shot at life.

If you look at South Carolina -- not a criticism, please don't think I'm being critical -- but in terms of, if you get out of Charleston or get out of Columbia and get into rural areas, South Carolina is not a great place for women to live. It actually turns out, in terms of some of the challenges, South Carolina has lower poverty rates, lower reading rates, and so forth.

We kind of came up with this idea of a vision for them to elevate the status of women in South Carolina. That was what their vision was going to be. They actually could say, you know what? They're actually doing that. By giving these women a second lease on life, they're doing it. It probably was a little bit too ambitious for them, so they said, "No, we're going to pull back a little bit."

I think you have to decide what your level of influence can be, and not get beyond that level of influence. I think as a college, they felt that might be a little bit bigger than us to take on as a school of 900 people. And for me, from the visionary side point, I thought, Well, yeah, but you're already doing this, so pretty exciting.

SPEAKER FROM THE FLOOR: Thank you.

MS. KELLY: We're going to take a shorter-than-planned break. We would like to begin the next session promptly at 10:45, so enjoy a shorter break.