



Strategic Plan of the Education Industry Association 2012-2015

Adopted by the Board of Directors 11-30-2011

Since its last strategic plan was written in 2006, the Education Industry Association has experienced significant changes, and during the past five years, the preK-12 education market has also evolved in important ways. Five years ago, EIA was internally focused on the organization's fiscal health and its potential role as the leader of a confederation of like-minded trade associations -- a concept that was tabled at that time.

During the past five years, EIA has made dramatic improvements in its cash flow and has created an operating reserve with over \$125,000 in deposits, adding at least \$25,000 each year. This stronger financial position has been built on a healthy mix of membership dues, fee for special interest group services, and conference revenue (especially sponsorships), coupled with expense management.

During that same time, EIA achieved notoriety in the U.S. Congress, the Administration, state/local education agencies and among civil rights organizations for our leadership on behalf of Supplemental Education Service (SES) providers, and developed effective skills organizing our member coalitions to represent special interest groups within the EIA community.

Leveraging this coalition strategy, EIA also led the effort to enact new tax credits for middle class families to access tutoring and test preparation. Draft legislation awaits Congressional action but the effort, once again, enhanced EIA's reputation as an effective advocate, before key stakeholders.

EIA created a Code of Ethics for education companies and used this to encourage and promote quality and accountability among entrepreneurs in education.

And EIA has become a well-recognized brand for entrepreneurs in education reform, as well as an information source for the media and the host of two annual conferences for private sector companies in preK-12 education.

We strive for improvement, of course, even as the environment continually changes. For example, while EIA membership revenue increases each year, the number of members has remained relatively flat, largely due to lower retention rates among smaller companies. Conference attendance has declined even though we have developed and marketed strong professional events. Congressional action on important federal education policies has stalled, while increasingly, States assume greater influence on preK-12 education matters. And SES providers, many of whom are EIA members, face extinction, unless they morph into a new and refreshed partnership with public schools.

Given EIA's recent history, when the EIA Board of Directors met for its strategic planning meeting in October, 2011, we examined these shifts, took stock of EIA's competitive strengths, and considered important drivers of change in the PreK-12 market including:

- The effects of technology on learning and managing student information;
- The personalization of instruction that individualizes learning;
- Severe budget cuts at State and Local levels;
- Greater pressure for teacher and school leader accountability for student achievement ;
- Common Core Standards and new assessment for college and career readiness; and
- Increased supply of education entrepreneurs, Digital Natives, magnified by Teach for America "graduates".

The outcome of this process: the updated strategic plan that follows, including an updated version of the EIA mission statement to reflect our repositioning.

Mission Statement

EIA serves as the leading voice for education entrepreneurs, advocating for the interests of businesses in the PreK – 12 market and serving as the knowledge center which integrates best practices and research that raise student achievement through innovation and improvement strategies.

The four strategic goals that support and advance the EIA Mission are:

- A. To deliver superior services that support the business growth of EIA's diverse membership, resulting in substantial increases in new members and the retention of current members.**
- B. To develop and utilize strategic partnerships (Hopkins, NIPSA, global initiative, inter-association coalition, etc) to advance the mission of EIA and the capacities of education entrepreneurs to innovate.**
- C. To serve as the industry-wide center of knowledge and ideas, compiling, summarizing and disseminating industry reports, trends and research on best practices in PreK-12 education to improve the state of the industry and PreK-12 education.**
- D. To conduct advocacy and strategic communications at the Federal, State, and Local levels in support of the role of the private sector in education. This includes ESEA reauthorization, tax incentives for tutoring, regulations/oversight of proprietary schools, and other targeted opportunities that affect the role of the private sector in public education**

Value Propositions to Members from Diverse Segments of the EIA Community

Members join EIA because they:

1. **Discover and form strategic business partnerships;**
2. **Act as an information source and “Go To” entity for education questions, business strategy and structure;**
3. **Obtain timely information and insight on business and government policies;**
4. **Rely on the association to amplify and focus the interests of education entrepreneurs in matters before the Congress, the Administration and State/Local governments;**
5. **Provide opportunities for smaller businesses to network and problem-solve; and**
6. **Act as a clearinghouse for learning best practices from each other and from outside experts identified by the Association.**

Specific deliverables planned for 2012 for each of these goals are discussed below. Full discussion from each Retreat work group then follows as a reference guide for out-year planning.

A. Member Services Goal: *To deliver superior services that support the business growth of EIA’s diverse membership, resulting in substantial increases in new members while retaining current members.*

2012 Deliverables:

1. Procure marketing vendor to support membership development and conference promotion. Increase new members by 25% and increase retention rate to 80% by the end of 2012.
2. Conduct member surveys and report results to membership on an ongoing basis.
3. Implement accreditation initiative by hosting three regional training sessions, and creating new application and accreditation protocols that result in at least 10 members conditionally approved for accreditation.
4. Ensure upcoming EI Days and EDVentures conferences are aligned to members’ interests and preview the future course developed in partnership with Johns Hopkins University-SOE;
5. Host at least 10 webinars on topics to include Franchising Opportunities with Huntington, Sylvan and Kumon (among others); growth strategies beyond SES; using social media to drive business growth; support for entrepreneurs; and exit planning.
6. Organize at least one new special interest coalition, covering such issues as online learning, private schools, school management/turn-around;
7. Publish at least 10 issues of Enterprising Educators, and expand the use of social media to enhance its utilization;
8. Plan and launch an aggressive social media campaign, using Twitter, blogs and the EIA website (social community “circles”) to create more attention for the EIA and its value proposition to education entrepreneurs, as well as new and more established education businesses;
9. Recruit student interns to support the social media and research activities (described elsewhere)

B. Strategic Partnerships Goal: *To develop and utilize strategic partnerships (Hopkins, NIPSA, global initiative, inter-association coalition, etc) to advance the mission of EIA and the capacities of education entrepreneurs to innovate.*

2012 Deliverables:

1. Implement at least two projects through the partnership with John Hopkins University School of Education (program evaluation, joint course or program on education/entrepreneur—teacher training; turn-around institute);
2. Implement trade association services for NIPSA member schools and complete due diligence that may lead to organizational merger;
3. Launch Innovations Coalition with support from “sister” trade groups to advocate for private sector and communicate standards of best practice;
4. Support launch of International Consortium of Education Entrepreneurs and provide technical assistance to US-companies for international expansion;

C. Research Strategic Goal: *To serve as the industry-wide center of knowledge and ideas, compiling, integrating, summarizing and disseminating industry reports, trends and research on best practices in PreK-12 education.*

2012 Deliverables:

1. Organize knowledge center on the website which compiles, integrates, summarizes and publishes research and business trend data;
2. Publish an annual report on the “state of the preK-12 industry” based on this collection of reports in time for distribution during EDVentures.
3. Use social media tools to promote EIA visibility and the role of the association as the source of leading industry indicators.

D. Advocacy Strategic Goal: *To conduct advocacy and strategic communications at the Federal, -State, and-Local levels in support of the role of the private sector in education. This includes ESEA reauthorization, tax incentives for tutoring, regulations/oversight of proprietary schools, and other targeted opportunities that affect the role of the private sector in public education*

2012 Deliverables:

1. Promote improvements to SES tutoring at the State level as State departments of education prepare waiver applications;
2. Develop and disseminate fact sheets and host webinars on new business ventures to help SES providers (and others) transition to new enterprises;
3. Identify specific advocacy and communication needs of proprietary schools;

4. Identify state advocacy experts and resources to help intervene with Governors, state superintendents and state legislators;
5. Include in social media plan referenced above, how it will advance the policy and advocacy goals of our members.

Note: Attached to the Plan, are the separate Work Group discussion reports that provide important context this Strategic Plan.

Description of Member Services Work Group Session:

- Contract with a membership/marketing vendor to assist in repositioning EIA's service to the broader preK-12 market (particularly in light of the diminishing SES sector), register new members, boost attendance at conferences, and drive more traffic to the EIA website. Examples of traditional and emerging sectors for focus include:
 - Test prep and tutoring
 - Private schools
 - School management
 - School turn-around (comprehensive school services)
 - Content publishers
 - Younger entrepreneurs (alum from Teach for America) and "digital natives"
 - Technology with emphasis on those firms that "apply" the technology to instruction
 - Investment community
- Use the data collection and distribution platform of EIA to serve members with content that will in turn attract and keep members. This content should include third-party research on the preK-12 industry as well as feedback from members on their business needs and expectations of EIA.
 - Conduct at least two types of surveys on a regular basis:
 - Survey EIA members to learn and better respond to their needs:
 1. Use survey responses to help connect those interested in similar issues and to create webinars and newsletter articles dealing with those issues.
 2. Quickly analyze the data generated and provide reports to EIA members. These on-going surveys will provide a baseline and trend data base on which to make data-driven decisions.
 - Survey EIA members (and the NIPSA community) and non-members on industry trends, feelings about current issues, and the business climate. Send out press releases to publicize these data to the wider education community.
- Implement the accreditation initiative by finalizing a streamlined application process and hosting regional training sessions, webinars and other communication outlets to discuss the features and benefits of accreditation.
- Target a new cohort of young education entrepreneurs, using the new JHU partnership, outreach to Business Schools, and Teach for America. Host mentoring sessions/webinars that teach young education entrepreneurs how to advocate for themselves. Teach them the terminology of the industry.
- Provide learning and networking opportunities to members that include:
 - Best in class conferences (EI Days and EDVentures) while exploring the possibility of regional events;

- Regularly scheduled webinars on topics to include Franchising Opportunities with Huntington, Sylvan and Kumon (among others), growth strategies beyond SES, social media, support for entrepreneurs, and exit planning. Use these forums also to solicit input in conference planning;
- New special interest coalitions including online learning, private schools, school management/turn-around;
- Member –to- member peer mentoring supported by the website;
- Regular publication of the electronic newsletter and the use of social media to enhance its utilization;
- Development of a Facebook-like social community on EIA website, making aggressive use of other forms of social media.

Benefits to EIA:

- Increase membership, especially among the next generation of education entrepreneurs while reaching out to established industry leaders.
- More quality and accountability among Member companies

Resources needed:

- Budget approximately \$60,000 to retain professional services of membership/marketing vendor.
- Use JHU and other student interns to help create and maintain a social media presence.
- Retain accreditation coordinator to oversee program development and roll-out.

Timeline:

- Develop and solicit bids from membership/marketing vendor and retain firm by Dec. 31, 2011.
- Publish results of membership survey and Board retreat on website and in newsletter by early December.
- Announce the accreditation plan and establish 2012 calendar of training sessions by Dec. 31, 2011,.
- Host at least one webinar before the end of 2011 and establish 2012 calendar of topics.
- conduct survey of NIPSA schools to assess specific needs at upcoming conferences and webinars by Dec. 31, 2011.
- Develop job description for student interns by Dec. 31, 2011.

Description of Strategic Partnership Work Group Session:

- Finalize the MOU with Johns Hopkins University School of Education and identify two or three actionable projects that can be developed in the next 12 months. Prioritize projects that foster business development opportunities for EIA members working with the University. These may include:
 - Institute for school turn around
 - “Incubator” initiative
 - Tutor/teacher training and certification
 - Evaluation studies to document efficacy
 - Professional development courses for JHU credit delivered by Members in their LEA/SEA contracts
- Disseminate findings of any joint JHU/EIA research using traditional media outlets and social media communication tools.
- Assuming the NIPSA Board of Directors approves the strategic partnership agreement with EIA in Dec. 2011, undertake the following initiatives:
 - Enroll at least three NIPSA schools as EIA members before Dec. 31, 2011 and another 40 in 2012;
 - Survey NIPSA members about their expectations/interests for sessions at the EI Days and EDVentures conference and develop programs that will attract them to these conferences;
 - Host at least three webinars of specific interest to private schools;
 - Conduct due diligence on a potential merger with NIPSA and present the EIA Board (and NIPSA Board) with an action plan that will be implemented before the end of 2012.
- Finalize the participation of at least three other associations (e.g. AAP, SIIA, and iNACOL) to partner with EIA on the Innovations and Quality Coalition to:
 - Develop proposals for and obtain funds from foundations, with EIA acting as the Secretariat of the inter-association coalition;
 - Prioritize the work products that document the economic and educational impacts of the private sector;
 - Disseminate findings using traditional media outlets and social media communication tools.
- Pursue an EIA international agenda to:
 - Develop contacts with US government agencies for export assistance to US-based education companies that wish to expand overseas, and disseminate this information via the website, webinars and at EIA conferences;
 - Provide limited assistance for the launch of the proposed ICEE for private schools;
 - Explore joining the nascent international association for tutoring organizations.

- Continue to be entrepreneurial by remaining open to new partnerships that are consistent with the strategic goal.

Benefits to EIA:

- Adds to the value proposition of membership by deepening the array of support for education entrepreneurs;
- Increases membership and new sources of revenue through these joint ventures;
- Creates greater stature and credibility for EIA; and
- Elevates the level of respect for the private sector.

Resources needed:

- Professional staff (consultants) time to support the development of the Hopkins' array of projects that will generate revenue.
- Potential legal review of NIPSA merger agreement documents.
- Obtain communications support from Digital Natives to fully exploit social media to communicate with members, EIA strategic partners, and the public.

Timeline:

- NIPSA initial agreement to be ascertained by Dec. 2011. Implement conference programming for EI Days (Feb. 24) and EDV (July 19th). Complete merger planning by Dec. 2012.
- By Nov. 30th, complete MOU with Hopkins and identify priority projects by Dec. 31, 2011.
- Support the Dec. 6th ICEE planning meeting in Istanbul and by Dec. 31, and make determination of follow-on support for its implementation.

Description of Research Work Group session:

- Compile and aggregate existing data and research reports (and their electronic links) for placement on the EIA website. Potential sources include other trade groups, investment community, What Works Clearinghouse, university-sponsored research, market research firms, government agencies, organizations associated with the education entrepreneurs, etc.

Topics include but are not limited to:

- Market sizing
- New business opportunities
- Business transactions and trends
- Research findings on program efficacy
- Best practices in PreK-12 education reform/student achievement solutions
- Provide written summaries including meta-analyses of third-party data, performing a curator role that makes the information accessible to EIA members and the broader education community.
- Publish the “state of the PreK-12 industry” on an annual basis based on the summarized findings of the published research/data and presented in conjunction with EDVentures conference and E.I. Days. Research reports could be sponsored by investment community.
- Utilize social media to communicate results of data collection on topics of interest to the education community, which will also drive traffic to the EIA web site. This will attract visits and membership from education entrepreneurs.

Benefits to EIA:

- Establishes EIA’s identity as the “go to “ source/clearinghouse of key industry metrics;
- Provides members, non-members and the media with valuable information on significant industry trends and best practices;
- Creates and supports intellectual leadership and “expert” roles for EIA staff and the Board;
- Creates a revenue opportunity to both fund its start-up at the EIF and sponsorship/ and subscription revenue from non-member users.

Resources needed:

- Use EIF to potentially house the knowledge fusion center and attract seed capital to offset costs of part-time staff (including university interns). Potential budget in \$100k range but initial costs and activity may be low and start up incremental.

Timeline:

- By March, 2012, conduct a preliminary survey of existing research reports and other relevant materials to serve as the initial content on the website
- Publish by EDVentures 2012, initial industry report.

Description of Advocacy Work Group session:

- Provide assistance to SES community through targeted outreach to States that seek a Federal waiver to ESEA. Step in where most needed and when requested by SES members.
- As the Federal role in education policy shifts to the States, focus future outreach to Governors, State superintendents and school boards, and State legislators. Identify key opinion makers and related resources in the states to serve as the specific messenger on EIA's behalf (versus direct lobbying by EIA to cover all States).
- Discover the specific advocacy needs of proprietary schools and develop a plan to implement their government relations needs.
- Utilize traditional media and social media communication tools to engage education entrepreneurs and the policy-making community that reinforces the value of EIA; e.g. create Facebook page for education entrepreneurs.
- Maximize EI Days to spotlight new policy and business interests in the preK-12 market; develop sessions of interest for private schools and emerging entrepreneurs; showcase the education policies of the top Presidential candidates; and provide information for companies wishing to go international.
- Utilize Member expertise and contacts to attract new entrepreneurs, while also leveraging relations with Members to attract larger and more established companies.

Benefits to EIA:

- Adds to value proposition of membership while leveraging the resources of EIA and its allies in the States;

Resources needed:

- Identify key resources at the State level to advocate on behalf of EIA and its interests. A pool of experts, perhaps by region, will be needed for short-term hire in order to assist EIA with state and local advocacy.
- Obtain young experts in social media, including Digital Natives and students who may intern at EIA to implement the social media agenda of EIA. Utilize an intern from JHU to monitor and post on all social media sites. Have an overlapping transition period between interns for continuity.
- Retain, as needed, government relations support for federal-state engagements for ESEA and tax credit initiatives; this is to be supported by special interest coalition fees whenever possible.
- Develop list of conferences of interest for education investors and entrepreneurs, at which EIA should have a presence.. Use Board members as staff surrogates.

Timeline:

- Complete SES outreach to States by Spring, 2012.
- Development social media plan by first quarter, 2012 and engage interns and others to implement the plan.

- Compile inventory of state resources throughout 2012.
- Develop advocacy plan and needs with NIPSA by first quarter of 2012.