



Doubling our Impact: 2025

A renewed commitment to elementary and middle independent
school leaders in ESHA's next 50 years of service

Letter from the Board Chair

Dear Members:

The Elementary School Heads Association (ESHA) is at an inflection point after five decades of service to school heads nationwide. This year marks our 50th Anniversary - an opportunity to celebrate, reflect on, and re-imagine who we are as an organization. This evolved identity will preserve our rich past while moving ESHA toward a future filled with possibility. We aim to balance the very best of who we were and the evolution of who we will become.

In ushering in a new 50 years of services to members, we must confront the very real challenges of the present day. Despite our extensive history in service to independent elementary and middle school heads, we are all too aware that the organization's value proposition lacks clarity, compounded by challenges in effectively communicating with current and potential members. This lack of clarity in a highly competitive national market has resulted in declining membership, which threatens the organization's long-term financial sustainability. As we embark on our 50th year, gaining new clarity in the value of ESHA and telling our story with excellence in messaging will capture new members while enhancing services and support for current members.

In this planning process, our Executive Committee leadership was struck by a simultaneous sense of urgency and excitement around tackling this challenge - urgency accented by the tremendous need to serve children and our communities and excitement tied to ESHA's sheer power and potential to deliver unparalleled value to elementary and middle independent education leaders. ESHA's key differentiator is its affinity focus on heads of elementary and middle independent education: something no other association provides and one we can uniquely excel at in the coming decades.

In honing our value proposition, we will direct services to heads of elementary and middle school independent education, leveraging the only national network focusing solely on the needs of leaders committed to Pre-K through 8 students. We will keep quality and excellence front and center by building on our successful services to members, doing better rather than simply doing more.

With our current and future members at the heart of all of our work, we are signing onto this "Double our Impact - 2025" plan, a big goal for ESHA to become the premier membership organization for heads of independent elementary and middle schools in the nation, doubling our membership to 150 or more by 2025.

We are eager to move forward and enthusiastic about the transformations to come. Cheers to our next 50 years – doubling our impact to serve all of our current and future heads of elementary and middle independent education better.

Sincerely,

Liz Hofreuter
Board Chair



In our new decades of service, we commit to keeping the very best of ESHA firmly intact while simultaneously evolving the organization to meet the growing needs of heads of elementary and middle school independent education.



OUR STRATEGIC VISION FOR THIS WORK INCLUDES

Our Core Purpose

To create an authentic network of elementary and middle school leaders who will challenge and change the educational landscape and impact their communities through connection, collaboration, and courageous leadership.

Our Mission

Promote collegiality, support the exchange of ideas, and champion independent elementary and middle school headship.

Our Core Values

LEADERSHIP

By building a community of leaders for leaders, we are creating a support structure that encourages and reinforces leadership practices in the Pre-K-8 space that are purposeful, comprehensive, authentic, innovative, and joyful.

COLLEGIALITY

By convening an authentic network of peers, we are providing value-driven opportunities for connection and collaboration.

EXCHANGE

By providing opportunities for the sharing of experiences, challenges, and successes while spreading innovative learning and promoting best practices.

RESTORATION

By permitting ourselves to take time away from school for rest and rejuvenation, we are changing the narrative on a healthy work/life balance for our teams and our industry.



Our Vivid Vision: Doubling our Impact

We will be the premier membership organization for pre-K-8 heads by pre-K-8 heads in the nation, increasing our membership and evolving our impact to include and support diverse representation from elementary and middle school heads.

We will cultivate an authentic network of peers who understand the unique challenges of leading independent elementary and middle schools and the remarkable possibilities that come with them. We will attract members from every state nationwide and develop a deep and diverse membership and talent pipeline for future Heads representative of different regions, schools, and student populations. Our members will seek us out for programming worthy of their limited time. We will succeed by providing meaningful opportunities for our members to convene and collaborate. Our members will be enthusiastic about our events and services with an “I can’t wait for ESHA” attitude. We will equip independent heads to be the thought leaders of elementary and middle school education. We will spread the word about the unique value independent pre-K-8 schools represent in our culture and inspire future educational leaders to join the movement.



Our Goal

To provide deeper learning experiences for our members and sustain our impact long-term, we seek to double our membership to 150 or more by 2025.





The Path to Doubling our Impact

2023 is a pivotal year for the next era of success at ESHA.

It's the opportunity to build a strong foundation for future growth. With a one-year implementation plan in 2023 dedicated to strengthening the organization's foundation, ESHA will prepare for its longer-term investments in 2024 and 2025 on the path toward doubling its impact.

The mantra for ESHA in the coming years is "better, not just more." It's building on our strengths with a focus on excellence and quality, investing in these critical priorities:

- 1 Become the nation's leading affinity association exclusively dedicated to meeting the needs of Heads of Schools at pre-K-8 independent elementary and middle schools.
- 2 Restore members' enthusiasm for ESHA with flexible, dynamic, and informative service offerings tailored exclusively to pre-K-8 independent educators.
- 3 Create a sustainable ESHA organization with strong governance practices and a staffing model that can support increased membership.
- 4 Create diversified revenue streams to fuel our strategic offerings.

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PRIORITY 1:

Become the nation's leading affinity association exclusively dedicated to meeting the needs of Heads of Schools at pre-K-8 independent elementary and middle schools. While the school will be our paying customer, Heads of Schools will remain the primary focus of our efforts, and their needs will be paramount and sacred across our efforts.

Our client and market development efforts will support the achievement of this priority in the following ways:

2023

- Create a "50 for the 50th" membership drive led by the Executive Committee (EC). Using relationship-based recruitments, sign on 50 new members before the 50th Anniversary celebration.
- Assign each EC to recruit 5 new members from a cultivated list of prospective donors. Provide each EC member with supportive resources to recruit effectively.
- Utilize other networking conferences, such as NAIS gatherings, to host ESHA-sponsored meet-and-greets for current and new members.
- Modernize ESHA's digital engagement of members and focus on upskilling leadership, including
 - Overhaul website to ensure it is sharp and connects directly with the needs of members and prospective members.
 - Create a member-only portal with a repository of meaningful resources.
 - Enhance the website capabilities around accepting payments and registrations, creating a landing page with membership information, a digital member registration form, and credible payment options for ease of one-time annual payment.
 - Revise the current newsletter to align with ESHA branding and to deliver value-add member content under the leadership of the Board Chair.

2024 & 2025

- Bring in an additional 25+ new members, focusing on incoming or newly-appointed pre-K-8 Heads. Remain open to welcoming schools of any size; prioritize outreach to schools with 101-700 students.
- Partner with select national executive search and recruitment firms focused on pre-K-8 independent schools to offer exclusive partnerships to incoming Heads of School.
 - Include a welcome packet, onboarding and transition services for newly appointed Heads of School, and access to membership-provided resources.
 - Allow selected firms to post headship job openings for ESHA members on the member's-only website portal, lead resource-sharing webinars, present at the Annual Retreat, and/or sponsor digital communications to members.
- Invest in ongoing digital enhancements, including
 - Continue to enhance the website with meaningful resources on the members' only portal and search engine optimization to meet the evolving needs of members.
 - Align the email marketing platform with service offerings and drive all traffic to the website. Consider an investment in a CRM system to expand market share and digital engagement.
 - Set aside all social media, instead driving traffic to the website with word-of-mouth marketing and, with time, enhanced digital practices, such as search engine optimization.

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PRIORITY 2:

Restore members' enthusiasm for ESHA with flexible, dynamic, and informative service offerings tailored exclusively to pre-K-8 independent educators.

Selectively create new offerings centered around convening, connecting, and supporting Heads of School to generate a unique value for our members that differentiates us from other national and regional associations.

Our program and service development and delivery will support the achievement of this priority in the following ways:

2023

- Begin to populate a members-only resource bank geared towards Heads of School with resources that currently don't exist in mass and/or are unavailable from other competitors.
 - Designate at least one member as the primary point of contact for each resource to field follow-up questions and support mentorship.
 - Facilitate virtual training/workshops where beneficial on newly added resources, allowing members to ask questions and providing a pathway for additional dialogue.
 - Maintain a vendor list with vetted options for third-party consultants in key contracting areas.
- Elevate the Annual Retreat to be a value-add to the newly refined mission and purpose of ESHA, emphasizing restoration, collegiality, and the casual exchange of ideas while generating new cash flow. Focus on a less-better approach to deliver maximum member value.
 - Emphasize the richness of content to create raving fans and bolster word-of-mouth marketing from the Annual Retreat, such as incorporating retired heads' panels, visiting key landmarks and schools for expanded learning, and holding time for member networking and collaboration.
 - Avoid a high volume of experiences within the Annual Retreat, instead, emphasize excellence within the experience while maintaining price competitiveness.

2024 & 2025

- Promote flexibility of exchange and dynamic response to members' needs by creating a comprehensive resource bank hosted on the website, with practical, timely, and ready-made resources geared exclusively towards the needs of pre-K-8 independent schools and educators.
 - Align resource creation to a thematic calendar focused on high-priority topics and make available to all members via the members-only portal.
 - Ensure all communications, including digital newsletters, webinar offerings, and coordinated calls, are aligned to the thematic calendar and reinforce the resource bank offerings emphasizing quality over quantity.
 - Designate existing members to champion the resource offerings, serve as the primary point of contact for fielding membership inquiries in a new "phone-a-friend" model, and ensure the resource stays up-to-date.
 - Evolve "Flight Calls" to align with high-priority topics for pre-K-8 independent educators and newly available resources on the resource bank. Sync newly-named calls with relevant times of the year and affinity of needs. Tap members with rich experiences to lead and make available to all.
- Create a 1:1 mentor program for new heads, leveraging the extensive experience of our membership to support emerging leaders within the profession.

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PRIORITY 3:

Create a sustainable ESHA organization with strong governance practices and a staffing model that can support increased membership.

Our organizational development and governance will support the achievement of this priority in the following ways:

2023

- Utilize the Executive Committee members as capabilities force-multiplier to off-set staffing and capacity limitations, including the following assignments:
 - Each board officer leads newly-established committees, such as membership, advancement, and the committee on trustees.
 - Executive Committee members “own” at least one thematic area, draft digital communications, facilitate open member discussions, host topic-specific webinars, recruit newly aligned sponsors, and serve as the primary point of contact for “phone-a-friend” requests aligned to the resource bank.
 - Assist with recruiting new members.

2024 & 2025

- Hire an Executive Director by no later than the end of 2023 with responsibilities for new membership sales, member services, and organizational advancement, in addition to administrative responsibilities.
- Contract with third-party firms, as needed, to bolster staffing capacity and meet member needs.



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PRIORITY 4:

Create diversified revenue streams to fuel our strategic offerings and generate an exceptional value for members, capitalizing on our flexibility to raise funds as a nonprofit while building out a traditional membership model that grows and sustains the organization's budget long-term.

Our funder and donor development will support the achievement of this priority in the following ways:

2023

- Revise the dues structure to move towards flat-rate, inclusive pricing focused on value-add service offerings. Revisit the flat rate annually to adjust for market factors. Offer bundled memberships, where beneficial, to minimize financial requests to members.
- Increase membership to 125 paying members by October 2023 through the "50 for the 50th" membership drive.
- Create fee-for-service revenue through vendor sponsorships.
 - Generate revenue from partnerships with select executive search and recruitment firms, including sponsorship of the Annual Retreat.
 - Invite suppliers who wish to access the independent elementary school's market to provide theme-aligned, timely, and relevant overviews of offerings via the resource bank, ESHA-sponsored digital community, newsletter, and/or webinars with an associated sponsorship deal.
- Use the 50th Anniversary celebration as an opportunity to create a "legacy fund" with past donors, longtime supporters, and retired heads contributing to the next 50 years of ESHA.

2024 & 2025

- Invest in the traditional membership model to grow membership to 150 school members or more by 2025. The doubling in membership should correspond with a nearly doubled budget size to support services to members.
- Pursue capacity-building and programmatic grants from foundations supporting membership initiatives, staffing capabilities, and related organizational efforts.

How we will Drive Membership Value

Our national focus promotes candor, encouraging open and honest dialogue without fear of competition among our members. We will retain this national focus and purview, embracing it as a value-add for our members. With this national focus in mind, we will intentionally recruit our members from all regions of the country, ensuring our membership is truly national and reflects the genuine diversity of our nation, schools, and heads.

Our members value meaningful relationships with like-minded professionals who face unique challenges as independent leaders within the pre-K-8 space. We will strengthen our commitment to developing collegial connections by restructuring our flight calls to deepen engagement and double our participation numbers. Calls will offer two tracks: a regularly scheduled open forum call and a specialized topical call led by current ESHA heads as subject-matter experts.

Supporting incoming ESHA heads is critical to the organization's future growth. We will prioritize new member onboarding by facilitating an introductory virtual meeting to learn about our new members and purposefully connect them to our ESHA resource bank. Utilizing the wisdom and experience of our veteran members, we will encourage the formation of mentorships through 1:1 programming, scheduled calls, and intentional introductions.



Our Required Capabilities

Two of our biggest obstacles to success are time and money: on the front end of this strategy, we're lacking in staffing capacity due, in part, to limited funding. With this in mind, our Executive Committee must roll up its sleeves in the first year of this plan to lend staffing support, roll out our enhanced first year of services, and usher in new members. We also anticipate hiring a part-time Executive Director by mid-to-late year in 2023 to bolster capabilities.

ESHA must excel at several core capabilities to deliver on the choices we've made, including:

- Creation and/or distribution of resources that are exclusively geared towards Pre-K - 8 heads.
- Fostering connectivity and a sense of community across member heads while also supporting a new generation of incoming heads.
- Promoting collegiality through an exceptional Annual Retreat experience and an openness for all members despite virtual connections.
- Best-in-class communications practices that are distinctively value-add and targeted towards member needs.



Our Key Measures for Success

ESHA leaders will hold the organization accountable for delivering on the vivid vision and priorities for future success with these key measures.

BY 2025, ESHA WILL ACHIEVE THE FOLLOWING:

150

Increase total membership to 150 or more.

95%

95% or more members will renew their memberships annually.

75%

75% (112) or more members will attend the Annual Retreat by 2025.

25%

Budgeted revenue will increase by 25% year-over-year through 2025, from \$75,000 in 2022 to \$150,000 by 2025.

70

Net Promoter Score rating by the membership of 70 or higher.

