

## BACKGROUND

Founded in 1842, Malvern Preparatory School is an Independent, Catholic college preparatory school for boys in grades 6-12. With a campus of over 100 acres, first class facilities and a local reputation for excellence inside and outside the classroom, Malvern Prep has for decades been considered an esteemed source of private education for young men in the Philadelphia area.

However, despite this tradition of success, the school had only managed to amass an endowment of about \$12 million over the years through gifts from alumni and enrolled families. As a result, Malvern Prep's ability to offer financial aid to help offset its \$30,000 annual tuition was greatly limited. In addition, critical classroom buildings were nearing the end of their usable life and would need to be replaced in the near future to maintain the school's 600 student enrollment. Things would need to change to sustain the institution.

In 2011, the school's Board of Trustees adopted a strategic plan to transform the institution by 2016 and position it for long-term stability and success. As part of this plan, Christian Talbot was hired as the Head of School in 2013 with the charge to build Malvern Prep into a nationally recognized leader in providing student-centered learning that prepares young men for lifelong success in the 21st century. To achieve this, Mr. Talbot determined that the school would need to better align its marketing, enrollment and development efforts under a shared institutional advancement strategy, as is commonplace in higher education.

To assist in the building and implementing this new advancement strategy, Malvern Prep turned to Fidelum Partners and its insights-based approach to strategy development.

## SOLUTION

As a means to build stakeholder alignment and develop a fact-based advancement strategy, Fidelum Partners utilized the following five-step strategy development process.

**Step 1: Destination Planning & Alignment.** Align key stakeholders in the marketing, admissions and development functions to a shared definition of Advancement success for Malvern Prep, while defining the scope of issues and opportunities to be addressed.

**Step 2: Advancement Situation Review.** Review internal data sources and conduct discovery interviews with key staff to develop hypotheses on how to better focus and align marketing, admissions and development efforts to achieve the stated Advancement destination.

**Step 3: Stakeholder Research & Analysis.** Conduct online survey research with alumni, current parents, prospective parent and employees to quantify their current perceptions, priorities and loyalty to the school, as well as their impact on enrollment and charitable giving.

**Step 4: Executional Advancement Objectives & Strategies.** Driven by survey research findings and stakeholder insights, develop a strategic framework that integrates all marketing, enrollment and development efforts under a shared set of Advancement objectives and strategies.

**Step 5: Roadmap of Tactical Projects.** Assist the marketing, admissions and development teams in developing a detailed two-year implementation plan that aligns all activities, events, processes and projects with Malvern Prep's Advancement objectives and strategies.

## NEW STRATEGIC DIRECTION & RESULTS

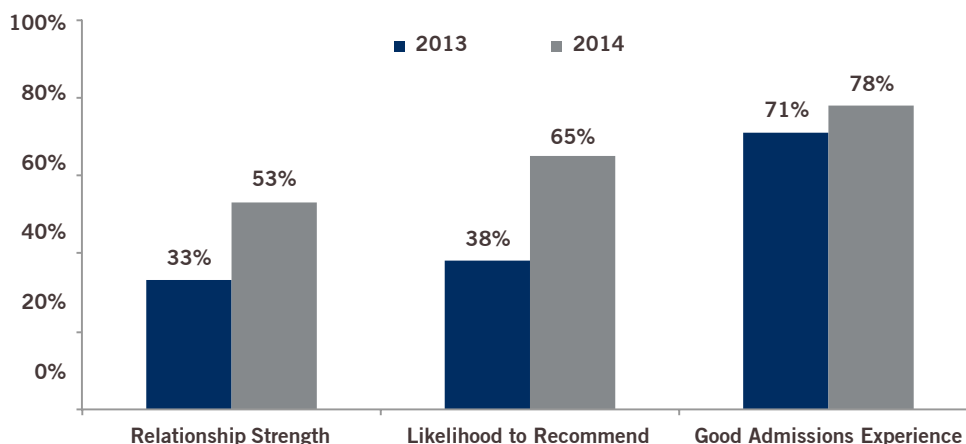
Relative to the Advancement Destination Statement that was developed, the Situation Review revealed that little was known about how the school was perceived by parents, alumni and employees, nor what changes were needed to strengthen their loyalty and financial support for the institution. As a result, quantitative research with each of these key stakeholders would be especially valuable. Online interviews were conducted with current parents, prospective parents, alumni and faculty & staff, yielding over 600 respondents in all.

### Key findings included the following:

- Encouragingly, all stakeholders strongly support the school’s mission to provide student-centered learning that prepares young men for life-long success.
- In addition, Malvern Prep is viewed very favorably for providing Catholic education, its convenient location, a beautiful campus and for its high-performing athletic programs.
- However, the school is viewed less favorably in the areas that matter most to parents, alumni and faculty, such as affordability, cultural diversity and building lasting relationships with families.
- Moreover, clear opportunities were identified to better align all advancement efforts on building stronger relationships and loyalty with all stakeholders, which will result in greater and more consistent financial support for Malvern Prep.

Armed with these and other penetrating findings, Fidelum guided Malvern Prep through the development of detailed, strategic and tactical plans. For the first time, these new plans integrate marketing, admissions, and development efforts with shared Advancement objectives and strategies. As a result, these groups are collaborating more effectively than ever before. In addition, thanks to changes in the admissions process the school has already seen measurable improvement in its reputation with prospective parents, while its stewardship efforts have yielded a \$4 million increase in its endowment as well. The momentum and progress at Malvern Prep are palpable, and the school’s future is again looking brighter than ever.

**Malvern Prep Admissions Feedback From Families Not Enrolled**



“Fidelum has transformed the way Malvern Prep thinks about and practices institutional advancement. We aspire to lead, and Fidelum is helping us achieve that vision.”

**Christian Talbot**  
Head of School, Malvern Preparatory School