

# Success Story

## Summit Academy Schools Process Helps Ensure Budget, Structure and Systems Aligned for Results



### Recap/Key Points

- Aligning organizational structure with mission reduced cost and resulted in a remarkable turnaround—from \$2.7 million deficit to a \$3 million surplus
- Reducing organizational layers eliminates silos and encourages collaboration
- TregoED problem-solving frameworks provide transparency, builds leadership capacity and increases trust

### District Information

Summit Academy Schools is a network of 24 K-12 tuition-free nonprofit public schools in Ohio, that serves more than 2,400 students. The district serves students who learn differently due to ADHD, Autism Spectrum Disorder, and other related challenges. Summit Academy Schools implements a therapeutic approach that meets students' academic, social, emotional, and physical needs.



### Problem/Challenge

Summit Academy Management (SAM) faced a major budgetary shortfall that had been building for some time, due to lower enrollment, top-heavy organization structure and previous short-term focused decision making. This imbalance resulted in insufficient resources for classrooms. It became clear that the organizational structure needed to change in order to allow Summit to put essential resources in direct support of its mission.

## Solution

SAM started by revisiting and reassessing its core values and mission. TregoED's strategy formulation process had helped set the *why*—clarifying who the organization is and wants to be. In addition, they benchmarked their organizational structure against optimal structures for serving students with special needs. Following the assessment, associates learned to apply TregoED's critical thinking processes. These processes help provide some of the *how* in achieving organizational goals. For example, staff throughout the organization have learned Situation Appraisal and regularly use it to surface issues and work with and through others.

The roles of executive-level chiefs, directors and managers were evaluated for how directly they aligned with meeting needs for students, parents, school staff and sponsors. This review helped make clear that certain high-ranking roles needed to be eliminated and the work and organizational structure reorganized.

The team developed a new administrative structure and did a comprehensive Potential Problem Analysis on the implementation obstacles it might face and ways to prevent or minimize their impact. Ultimately, the organization went from having six chiefs to two vice presidents and a CEO. The old organization encouraged silos and lack of cooperation across and among areas. The new structure more directly aligned resources for the schools so there was a clear and reasonable chain of command and schools could more easily get the resources they needed.

## Results

By reducing complexity and organizational levels, the reorganization opened up internal communication, reduced silos, and allowed more staff members to have a voice. The resulting organizational culture is increasingly positive, participatory, and cooperative. The organization values its employees and their input and is demonstrating that via professional development and participation in problem solving. Resources are being channeled towards stated goals and mission.

Most importantly, the reorganization allowed resources to be redirected from top-level positions to those directed at academic achievement and student support. As an added plus, the financial health of the organization saw a remarkable turnaround—going from a \$2.7 million deficit to a \$3 million surplus applicable to the academic budget.

Summit Academy Management has also put several key ingredients for sustainable success in place—a clear strategy and inspiring mission, tools for effectively addressing operational issues, an organizational culture that supports collaboration and communication, and committed and capable people.

“TregoED's critical thinking tools have helped us positively shift our culture and provide a strategic and operational foundation for our future.”

John Guyer, Chief Executive Office  
Summit Academy Management

