

**Governing for Greatness Series**

# Strategic Planning in Action



**BOARD  
NETWORK**



**Mary Bradley**



**Lisa Diaz**



**Maria Pilar Paradiso, J.D.**



NATIONAL CHARTER SCHOOLS  
**INSTITUTE**

**BOARD**  
NETWORK



# A Community Designed to Elevate Your Boards

[www.CharterInstitute.org/Board-Network](http://www.CharterInstitute.org/Board-Network)



# A Community Built for Boards Enjoy the Advancement!



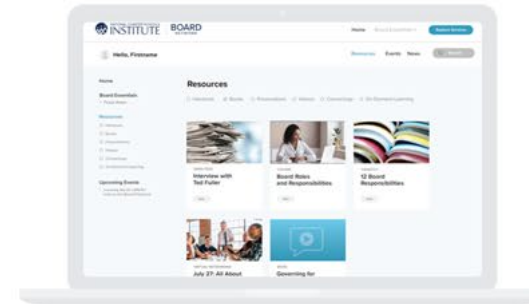
## On-Demand Learning

Online trainings are released each month with timely board related topics that will earn you credentials.



## Networking & Events

Connect with your peers and acquire best practices from across the nation with monthly virtual networking events.



## Tools & Resources

Access a resource library comprised of a broad range of tools and information to advance your board.



**BOARD**  
NETWORK





## **Lisa Diaz**

*Lumen Impact Group, Founder*

Lisa is recognized across the country for her foundational work with schools, nonprofits and small/medium-sized businesses. Clients rely on her expertise in effective leadership, organizational change, strategic planning, intentional culture, and management and systems processes. As a facilitator, Lisa turns the mirror around and shines new light on clients and their work. She ensures diverse voices, stakeholder feedback and data are considered, and she uses probing questions to expand leader and team perspectives. With more than 20 years of board-level and leadership coaching experience, Lisa helps leaders and governing boards bring their best selves to their organizations and teams — all in pursuit of effective partnership and impactful outcomes.

Lisa lives in central Michigan with her husband and three sons, all of whom are at different stages of spreading their wings and heading out into the world. Regularly shifting from carpool mom to Lumen leader and back, Lisa inspires her family to “work hard, play hard” and enjoys skiing, traveling, theater, and visiting a large extended family.





## **Maria Pilar Paradiso, J.D.**

*LINK Community Charter School, Head of School*

Maria is committed to educational equity. While she started out working in nonprofit, political fundraising, and public interest law, she found her true passion at Link Community School, now Link Community Charter School, where students receive a robust education, exposure, and enduring Core Values that harnesses their gifts and talents, as they prepare for exemplary high schools and life long success.

Maria joined Link in 2002, and before serving as Head of School, she held the positions of Director of Development and Vice Principal, Director of Institutional Advancement. Maria has been instrumental in achieving the school's strategic goals and objectives over the past 22 years. She has provided hands-on leadership, working closely with the board of trustees, to develop and implement major initiatives, including moving the school to its current facility on Pennsylvania Avenue; securing approval for charter school conversion, thereby transitioning an independent 7th and 8th grade middle school to a public charter school; expanding the school's program and enrollment multiple times (taking enrollment from 120 to 450) with the thoughtful addition of grade levels one at a time to ultimately develop a full Kindergarten to 8th grade program. She has led the school through renewal cycles and expansion requests to the NJ Department of Education, all the while demonstrating positive student outcomes.

Maria is a member of the Advisory Board for Jazz House Kids and a member of the Board of Trustees for Newark School of the Arts. She has also served on the board of Project U.S.E., where she remains an active partner.

Maria lives with her husband and four children in Cranford. She is a native of Argentina and is fluent in Spanish.



# National Charter Schools Institute Board Network

Keeping Strategy Alive



# What will we cover today?

- What is Strategic planning?
- The Value of a Strategic Planning Process
- Keeping Strategy Alive is a Team Effort
- Q&A with Maria and Lisa



## Strategic Planning IS . . .

- Longer Term--3-5 Years
- Higher Level—focused on the why and the what
- Grounded in your school's mission
- Targeted towards your school's vision
- Built in collaboration--governance and implementers
- Inclusive of stakeholder feedback as a best practice

## Strategic Planning is NOT . . .

- An annual operational plan—focused on the how
- Built in a silo with just board or just administration
- Meant to be a static, inflexible document for posterity
- A one-day exercise



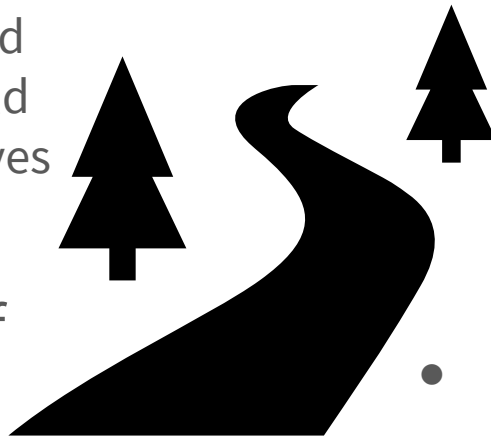
# The Value of a Strategic Planning Process

- Collaboration and shared ownership of the Strategy between board and school level folks

- Board Members, School Leaders, and School Staff coming together to build the plan, bringing unique perspectives

- Clarity on the big picture focus of the school

- Shared understanding of priorities to move towards the vision for the school



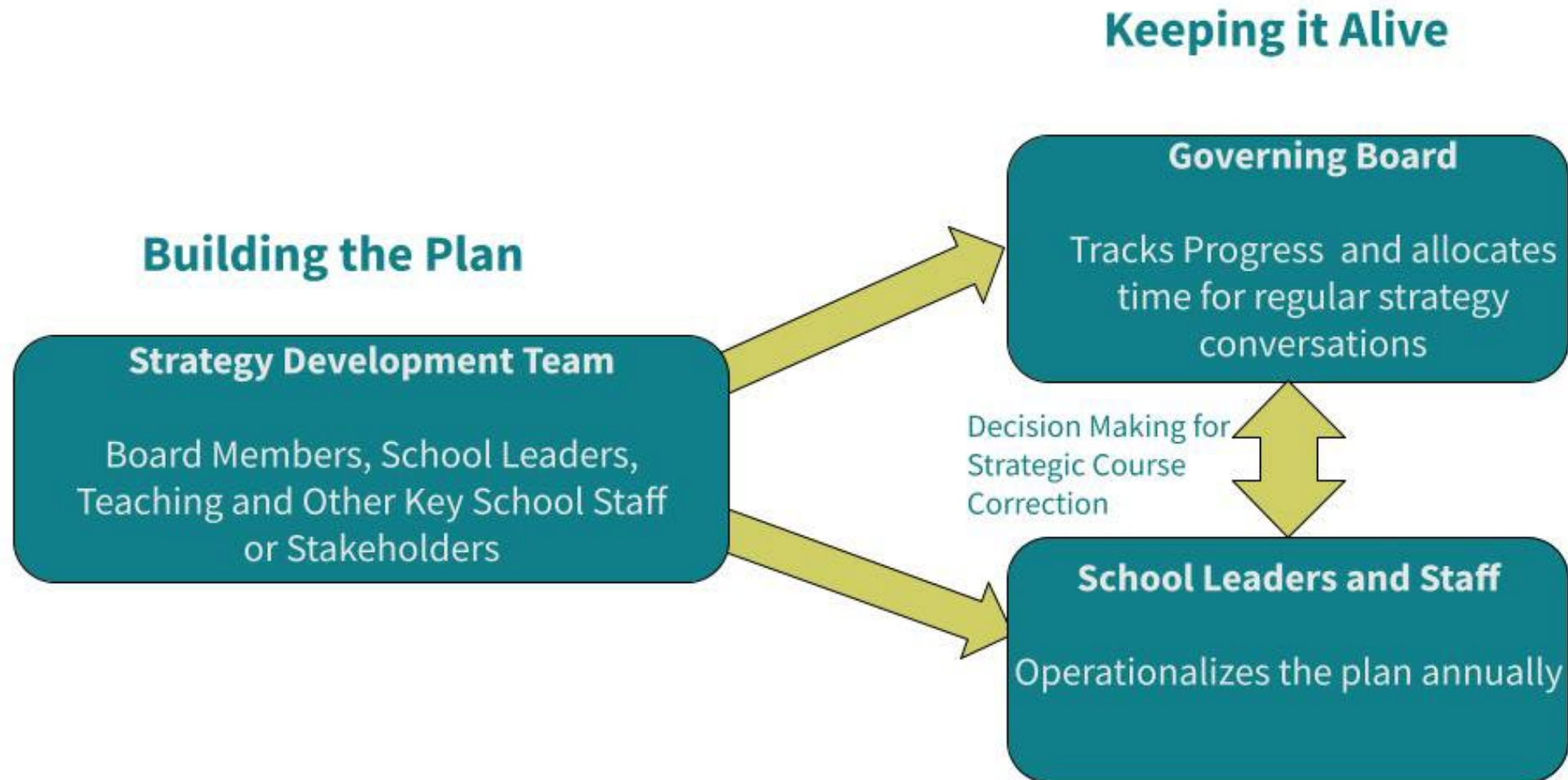
- Clarity on the activities and timelines to move towards that focus

- Ambitious AND Attainable goals and objectives built together for implementers to operationalize at the school level and stay focused

- Clarity around what success looks like

- Metrics of success created in collaboration for governance and implementers to track progress of the plan

# How do you keep your strategy from gathering dust?





# Governance Level Strategic Conversations

## Strategic Discussions:

To support the strategic plan not gathering dust on a shelf, the Board commits to the following:

- 1) Determine what strategic priority should be the focus of each quarter of the year. Ex. Operations in the Spring quarter because it impacts next year's budget building.
- 2) Determine if you will—a. commit x mins at each board meeting to discuss elements of that quarter's strategic priority or b. commit x mins at one meeting each quarter to discuss that quarter's strategic priority.
- 3) At the beginning of each quarter, review the vision, goals, objectives and metrics for the chosen strategic priority. As a board, discuss and document what you are curious about. This will give the leadership team time to prepare who and what information could be shared and who should be included in the conversation.

<b>Board Meeting</b>	<b>Strategic Priority Topic</b>	<b>Desired learning/understanding</b>

# School Level Operationalizing: Tracking the Timeline

	Staff Culture and Development			Curriculum and Instruction			Parent Engagement and Empowerment		Student Culture	
	Use relevant, robust, and differentiated materials that provides opportunities to enhance professional practices	Establish effective coaching support for teacher efficacy in order to increase scholar achievement.	Cultivate an intentional staff culture through collaboration.	Refine curriculum and offerings using culturally responsive materials and real-world tasks and opportunities to prioritize the scholar's experience and increase engagement.	Implement new instructional methods to promote student engagement (including authentic tasks and practical application).	PCSST will refine standard processes (rubrics) for staff and scholars to use data in tracking performance towards mastery and inform scholar learning goals and instruction.	Empower parents to support their scholars' learning and track their progress.	Increase family engagement in the school community.	Establish a consistent cross-campus scholar experience through shared ownership and shared accountability around district-wide and age-appropriate scholar expectations, routines, incentives, and traditions.	Increase student engagement through the elevation of student voice and agency in school culture.
Winter 2024						By Winter 2024, teachers consistently use student data to inform pace, interventions, and differentiation of instruction to address scholar mastery of standards.				By Winter 2024, establish functional high school scholar leadership organizations for practicing problem-solving, soliciting scholar voice in school matters, and organizing social events to increase student engagement and a sense of belonging.
Spring 2024			By Spring 2024, co-lead shared, co-constructed staff norms for collaboration including productive peer-to-peer feedback.			By Spring 2024, PLCs are structured to allow effective professional practice cohesively.				
Summer 2024	Winter 2024, create and test a data-driven needs and future vision plan, grade, content, and professional development needs to drive identified and TBD.	By Summer 2024, develop a system for staff to individually assess research, tools, and professional development on the most impacted instructional topics as needed.						By Summer 2024, provide more options for parents to engage in and contribute to the school, responsive to parent work schedules and needs.	By Summer 2024, provide culturally responsive social events for families and community members to partner in school learning and be a part of the PCSST community.	
Fall 2024		By Fall 2024, implement a math and literacy coaching program for all math and literacy teachers.	By Fall 2024, provide regular team-building opportunities for professional collaboration and staff development, outside of instructional practice PD.	By Fall 2024, pilot a new mentoring program including: strategic goal setting, strategic mentor pairing, and protocols and schedules to support the mentoring relationship.	By Fall 2024, PCSST will revise the curriculum for mathematics and science that connects to the real learning standards.	By Fall 2024, PCSST teachers will use authentic tasks for assignments that require students to apply their learning in practical and meaningful ways, allowing them to demonstrate mastery of the subject matter.	By Fall 2024, enhance scholar inquiry avenues for school career transition to ensure all families have access to and receive regular school updates.		By Fall 2024, evaluate routines and traditions at each campus for alignment to school mission and cultural goals.	
Spring 2025				By Spring 2025, PCSST will offer career access programs that explore scholars to various industries, professions, and career pathways that will provide scholars with skills and experiences related to their future careers.						
Fall 2025	By Fall 2025, design a strategic roll-out program that supports coaches and teachers in developing strong and lasting professional relationships with all teachers (beyond math and literacy).			By Fall 2025, PCSST will offer career access programs that explore scholars to various industries, professions, and career pathways that will provide scholars with skills and experiences related to their future careers.	By Fall 2025, PCSST will revise the curriculum to become more culturally responsive and address the diversity of learners in our community.	By Fall 2025, PCSST will establish partnerships with local businesses and organizations to create experiential opportunities for scholars that will allow them to have hands-on, practical learning experiences and relationships in real work environments.			By Fall 2025, high school extracurricular options and programming are given priority by scholars.	By Fall 2025, establish a peer feedback process to increase scholar voice and autonomy in solving interpersonal differences.
Spring 2026						By Spring 2026, students consistently track and reflect on their own progress towards mastery of standards using established criteria.				

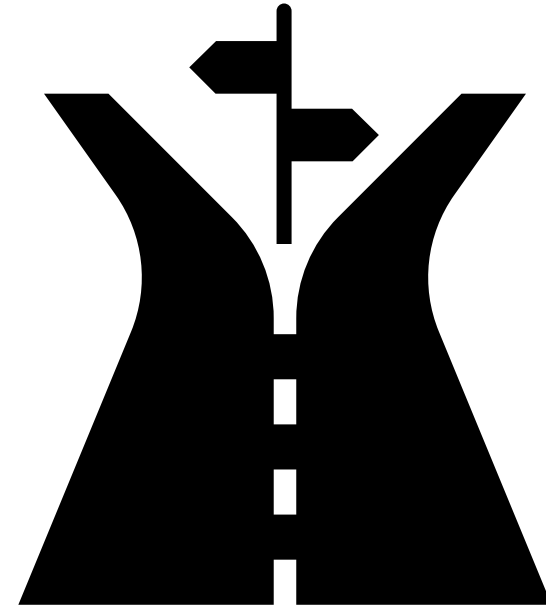
# School Level Operationalizing: Tracking Objective Implementation

Objectives	Implementation Lead
<b>Staff Culture and Development</b>	
By Summer 2023, annual key topics derived from analysis of school-wide needs inform an annual PD calendar consistently implemented throughout the year.	School or Board Lead Name
By Fall 2023, develop a tiered coaching cycle schedule for math and literacy based on the supervision hierarchy and the org chart.	School or Board Lead Name
By Fall 2023, create and implement a master schedule that provides teachers time for collaborative work and peer observations.	School or Board Lead Name
By Spring 2024, codify shared, co-constructed staff norms for collaboration including productive peer-to-peer feedback.	School or Board Lead Name
By Summer 2024, create and implement a data-driven needs assessment for identifying current and future whole district, campus, grade, content, and individual professional development needs to drive more differentiated and coherent PD.	School or Board Lead Name
By Summer 2024, develop a system for staff to individually access resources, tools, and professional development on the most requested instruction topics as needed.	School or Board Lead Name
By Fall 2024, implement a math and literacy coaching program for all math and literacy teachers.	School or Board Lead Name
By Fall 2024, provide regular team-building opportunities for professional collaboration and trust development, outside of instructional practice PD.	School or Board Lead Name
By Fall 2025, design a strategic roll-out program that supports coaches and teachers in developing strong and trusting professional relationships with all teachers (beyond math and literacy).	School or Board Lead Name
By Fall 2024, pilot a new mentoring program including intentional goal-setting, strategic mentor pairings, and protocols and schedules to support the mentoring relationship.	School or Board Lead Name

Objectives	Implementation Lead
<b>Curriculum and Instruction</b>	
By Fall 2023, School will use a diverse set of instructional strategies that promote total and active participation and collaboration.	School or Board Lead Name
By Fall 2023, rubrics and mastery criteria for all assignments are refined and communicated to scholars.	School or Board Lead Name
By Winter 2024, teachers consistently use student data to inform pace, interventions, and differentiation of instruction to achieve scholar mastery of standards.	School or Board Lead Name
By Winter 2024, design and execute training and support for teachers on providing feedback on standards-based assignments aligned to mastery criteria to support scholars' understanding of how to achieve mastery.	School or Board Lead Name
By Spring 2024, PLCs are structured to drive effective professional practice consistently.	School or Board Lead Name
By Fall 2024, School will revise the curriculum for real-world relevance and meaning that connects to the NJ learning standards.	School or Board Lead Name
By Fall 2024, School teachers will implement student-centered lessons that promote critical thinking and real world problem-solving strategies.	School or Board Lead Name
By Fall 2024, School teachers will use authentic tasks for assignments that require scholars to apply their learning in practical and meaningful ways, allowing them to demonstrate mastery of the subject matter.	School or Board Lead Name
By Spring 2025, School will offer career access programs that expose scholars to various industries, professions, and career pathways that will provide scholars with skills and experiences related to their future careers.	School or Board Lead Name
By Fall 2025, School will revise the curriculum to become more culturally responsive and address the diversity of learners in our community.	School or Board Lead Name
By Fall 2025, School will establish partnerships with local businesses and organizations to create apprenticeship opportunities for scholars that will allow them to have hands-on, practical learning experiences and mentorships in real work environments.	School or Board Lead Name
By Spring 2026, students consistently track and reflect on their own progress towards mastery of standards using established criteria.	School or Board Lead Name

# Strategic Course Correction

- When will the Board and School Level Administration check in on progress?
- What will the decision making process for Strategic Course Correction be?
  - Remember– A strategic plan is a living document!



Question?

---

Answer



# Let's Connect!

Lisa Diaz, Lumen Impact Group

[lisa@lumenimpactgroup.com](mailto:lisa@lumenimpactgroup.com)

Maria Pilar, Paradiso, LINK Community Charter School

[mparadiso@linkschool.org](mailto:mparadiso@linkschool.org)

Mary Bradley, National Charter Schools Institute

[mbradley@charterinstitute.org](mailto:mbradley@charterinstitute.org)



NATIONAL CHARTER SCHOOLS  
**INSTITUTE**

**BOARD**  
NETWORK



# A Community Designed to Elevate Your Boards

[www.CharterInstitute.org/Board-Network](http://www.CharterInstitute.org/Board-Network)



# Join Us for Our Next Board Webinars

## Upcoming Topics...

**May**

7 Habits of Highly Effective Boards

**June**

Board as Advocates

**June**

Board Homeroom  
National Charter Schools Conference  
Come start each day with us!

