

# Strategic Goal Setting

Maryland Alliance of Public Charter Schools  
**August 1, 2021**

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EducationBoardPartners

great boards. great schools.



**Education Board Partners** is the only national nonprofit organization dedicated exclusively to strengthening nonprofit boards in education. We focus our work to ensure **quality, equity** and **accountability**.

We are a team of teachers and educational leaders who believe **every child** deserves the opportunity to attend an excellent public school.



# Urgent Versus Important



**Whirlwind**  
(The Day Job)



**Goals**  
(New Activities)

# Agenda

1	Welcome, Agenda, and Objectives
2	Temperature Check
3	The Framework
4	Timeline
5	S.M.A.R.T.(I.E.) Goals
6	Act Strategically: Goal Setting
7	Things to Consider



# Objectives

1. Understand how to use a framework for structuring the goal-setting process.
2. Discuss a timeline for implementing the goal-setting process for your board.
3. Identify and outline key steps in establishing strategic goals.



# Temperature Check



# What Worked?

- What goals have you set for yourself in the past year? Did you reach your goal? Why or why not?
- Think about New Year's resolutions, sports goals, hobbies or any other area of your life that you have made a goal. What process did you use to achieve it?





# What Worked?

- **Talk to your team**
  - Did we set goals last year?
  - Did we monitor and celebrate or course correct?
  - Were we laser focused on our specific goals?
  - Is there anything we would do differently?
- **Share something with the group**



# Standards for Effective Governance



Focus relentlessly on student achievement



Recruit and retain an exceptional leader



Invest in exemplary governance



Act strategically and be accountable



Raise and use resources wisely



Commit steadfastly to compliance

**Center People, Culture and & Equity**

# What is a School Leader?

We define the school leader as:

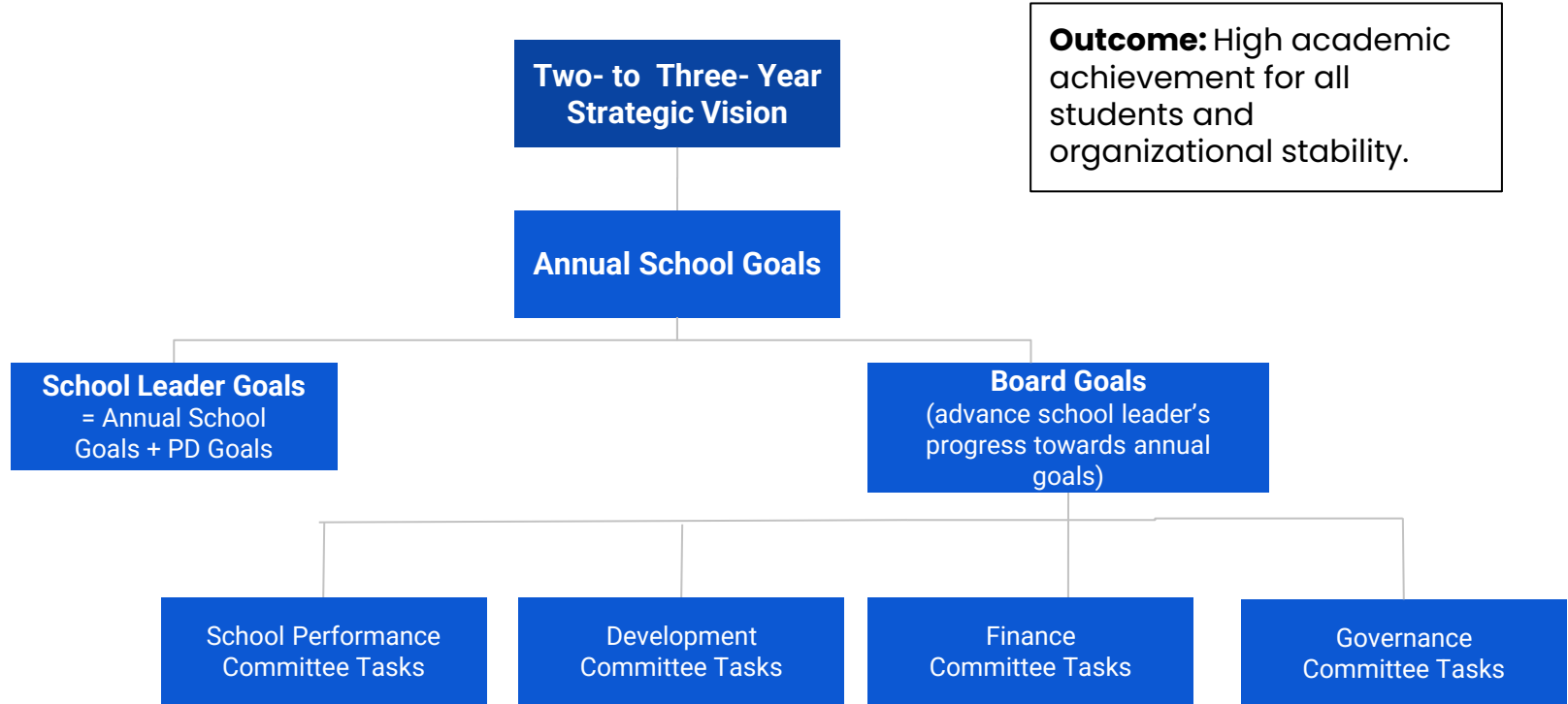
- Chief Executive Officer
- Executive Director
- Principal
- Head of School



# The Framework



# Annual Goal Setting Framework

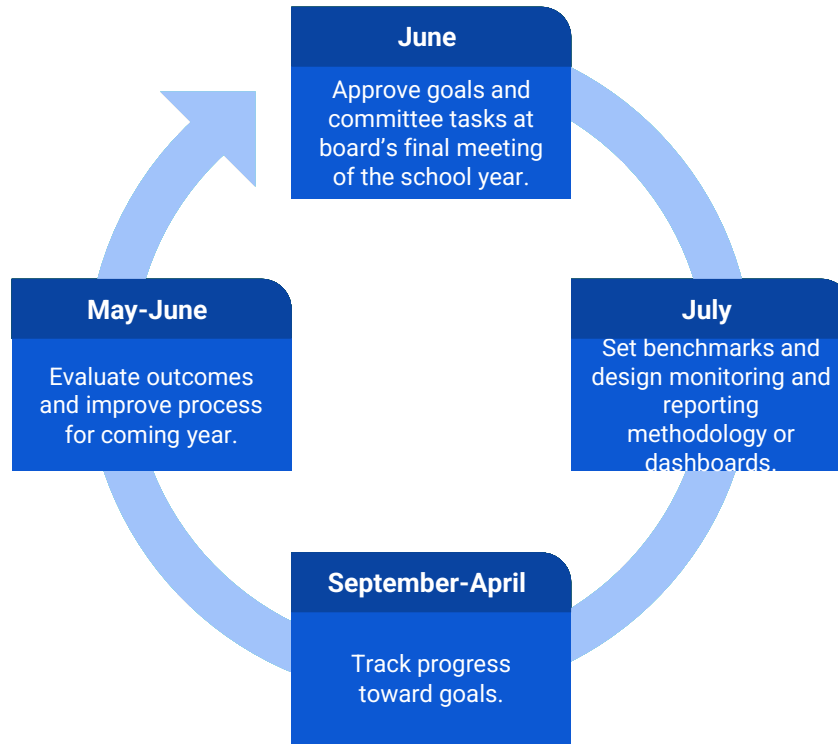




# Timeline



# Timeline



Boards should work with their school leader to develop a perennial timeline for setting, monitoring, and evaluating annual goals.

# S.M.A.R.T.(I.E.) Goals





## Pop Quiz

1. What does S.M.A.R.T. stand for?
2. How do S.M.A.R.T goals work?
3. What are some examples of S.M.A.R.T. goals?



# S.M.A.R.T. Goals

 <b>Specific</b>	 <b>Measurable</b>	 <b>Attainable</b>	 <b>Realistic</b>	 <b>Time-bound</b>
<p>Do: Set real numbers with real deadlines.</p> <p>Don't: Say, "I want more visitors."</p>	<p>Do: Make sure your goal is trackable.</p> <p>Don't: Hide behind buzzwords like, "brand engagement," or, "social influence."</p>	<p>Do: Work towards a goal that is challenging, but possible.</p> <p>Don't: Try to take over the world in one night.</p>	<p>Do: Be honest with yourself- you know what you and your team are capable of.</p> <p>Don't: Forget any hurdles you may have to overcome.</p>	<p>Do: Give yourself a deadline.</p> <p>Don't: Keep pushing towards a goal you might hit, "some day."</p>

# S M A R T I E



Specific



Measurable



Attainable



Relevant



Time Based



Inclusive



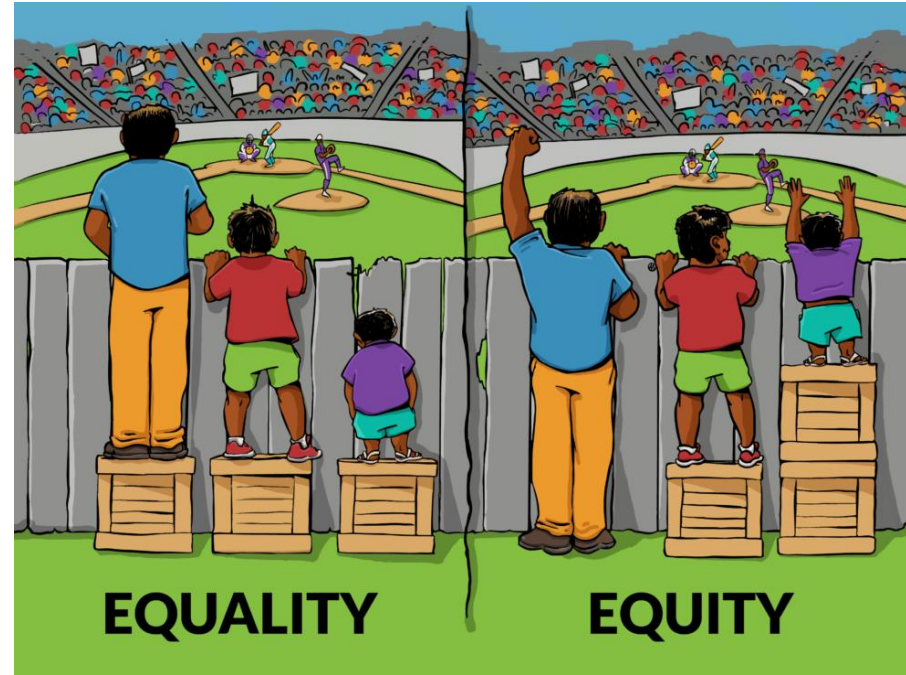
Equitable



# SMART, Inclusive and Equitable

**INCLUSIVE** | brings traditionally excluded individuals and/or groups into processes, activities, and decision/policy making in a way that shares power.

**EQUITABLE** | includes an element of fairness or justice that seeks to address systemic injustice, inequity, or oppression.

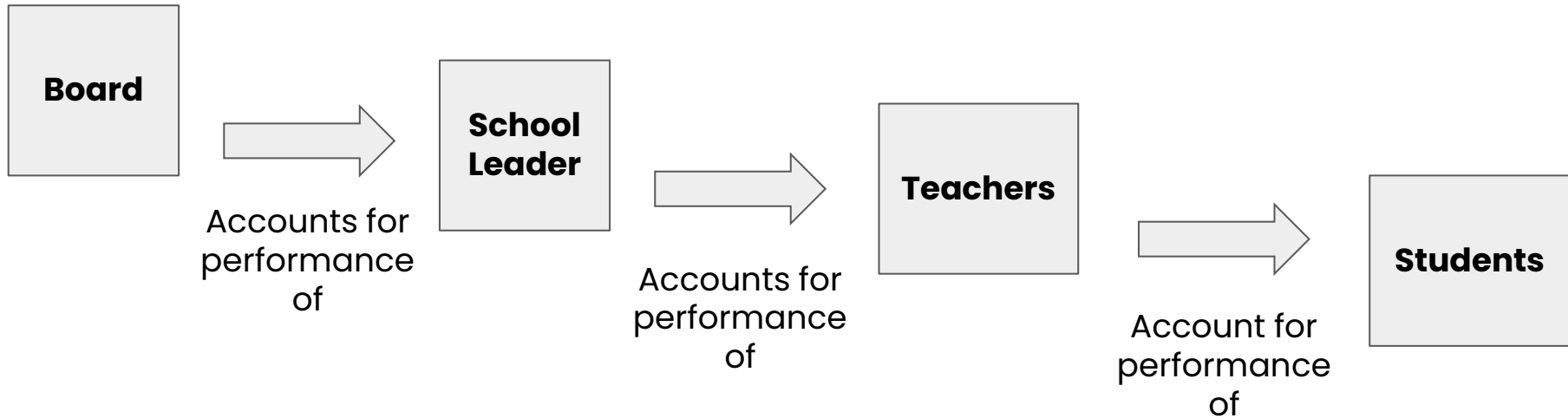


# Act Strategically: Goal Setting



# Act strategically

- Determine the strategic direction for the school
- Respect the balance between oversight and management



# Things to Consider

- Your **school** included goals and annual indicators of progress
- What do you need to get done each year in order to be on track to meeting them?
- Are you **working in partnership** with your school leader to set and achieve annual goals?
- Are you regularly **talking about goals** and making course corrections if you are off track?

# School Leader Goals

- Annual goals should define special aims and targets beyond the regular roles and responsibilities of the school leader.
- The school leader's goals for the year should identify ambitious but realistic targets for:
  - Improved academic performance
  - Organizational performance
  - Fiscal wellbeing
  - Professional development goals





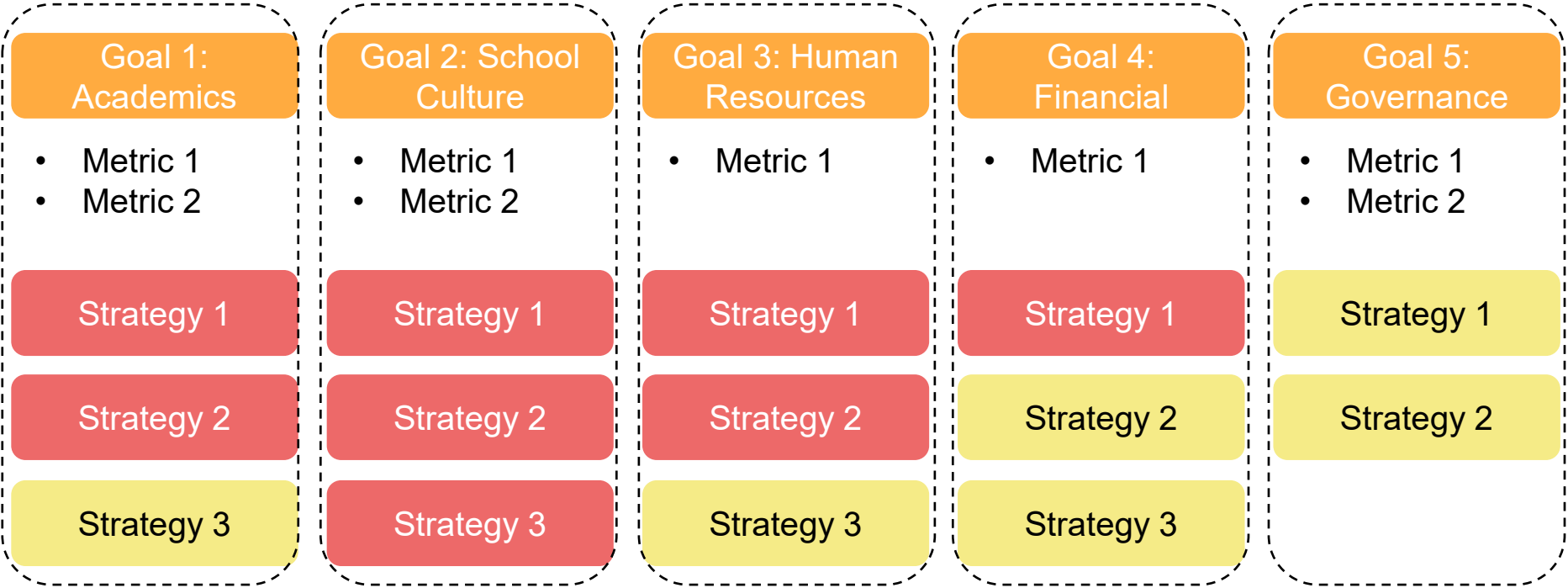
# Board Goals

- Goals should define special aims and targets beyond the regular roles and responsibilities of the board.
- The board's annual goals should align with the *EBP Standards for Effective Governance*
- The goals should focus on:
  - Enabling the school leader's work;
  - Strengthening the board's oversight capacity; and
  - Ensuring the long- and short-term viability of the organization.



# Framework

## 2-3 Year Strategic Vision



**Three-Year Strategic Vision:** Wonder Academy will prepare students for successful post secondary opportunities and be a beacon of hope for the community we serve.

**Goal 1:**  
Academics

- Raise graduation rate to 100%
- 65% of students are proficient in ELA and Math

Strengthen PLCs



School strategy

Implement PD on differentiated instruction



School strategy

Implement and monitor academic dashboard



Board strategy



**Three-Year Strategic Vision:** XYZ Public Charter School will be among the highest performing public charter schools in the city with the financial and organizational capacity to expand to two additional campuses.

**Goal 2:**  
Finances

- Meet or exceed 100% of capital campaign goals.
- \$2M in cash reserves to fund future capital expenditures.

Meet or exceed its capital campaign target of \$2.1M.



School Leader Goal

Operate with a balanced budget including three months of operating cash on hand (\$500k)



School Leader Goal

100% of board members will make an annual gift to the school



Board Goal



## Example Board SMARTIE Goal

**By June 30, 2021, the board will contribute to the development of and approve the use of an academic dashboard for monitoring student outcomes, including all subgroups, to be reviewed at board meetings.**

## Example Academic Committee Strategies

- Talk to the SL and CAO about what high level metrics they collect that can show an overall picture of how all our students are performing.
- Get sample dashboards from Education Board Partners or other schools to review and adapt.
- Develop a calendar of when to share deep dive/disaggregated data with full board for discussion.



# Case Studies



# Test Your Knowledge

## Question 1

What if we don't have a strategic vision or plan?

- *It's ok—you have to start somewhere. Develop your annual goals now, and you can work on the strategic plan simultaneously or later. Use EBP's Strategic Planning tools for guidance.*

# Test Your Knowledge

## Question 2

Who drafts each set of goals?

- *It depends. For most schools, the school leader prepares an initial draft of their goals and shares with the board chair for input before sharing with the full board for feedback. In all cases, the board should develop its own goals and consult with the school leader as appropriate. Committees develop their own tasks and action plans to be approved by the full board.*



# Test Your Knowledge

## Question 3

How many goals should we have?

- *Typically, both the school leader and the board set four to six goals each year.*

# Test Your Knowledge

## Question 4

What is the best time of year for goal setting?

- *The end of school year is ideal for most schools. Some schools, however, have found the beginning or middle of the school year to be most convenient, as goal setting can be informed by the results of the previous year's student performance assessments. Pick what works best for your school.*

# Test Your Knowledge

## Question 5

What's the difference between a goal and a task?

- *A goal is an outcome, whereas a task is an action step. A goal is an objective to be accomplished by a set of tasks.*

# Test Your Knowledge

## Question 6

How does the school leader evaluation fit into this?

- *The school leader evaluation should inform the goal-setting process. The school leader's annual goals should reflect his/her performance against the previous year's goals. For example, if the school leader only partially completes the goal of all fourth-grade students performing at or above grade level in reading, then this goal will need to be revised and included among the coming year's goals.*

# Committee Goals

Committee	Goals	Committee Members
<b>School Performance Committee</b>	Monitor student achievement on school-wide interim assessments at least quarterly using an academic dashboard that has been created to support both school and board leaders in understanding progress.	<b>Members 1-3, School Leader, and Principals A, B, and C</b>
<b>Governance Committee</b>	Create board member and chair succession plan by January 2021 in anticipation of board turnover in September 2021.	<b>Members 4-6</b>
<b>Development Committee</b>	By June 2021, board members solicit individual Members 7-9 donations strategically and effectively for the capital campaign, yielding \$200,000 allocated for the new gym.	<b>Members 7-9</b>
<b>Finance Committee</b>	By February 2021, complete legal audit to ensure XYZ Public Charter School is in compliance with all local and federal regulations.	<b>Members 10-12</b>

## Now It's Your Turn

1. Use the worksheet and framework to establish board goals.
2. Develop specific goals for each board committee.
3. Ensure the board goals align with the school staff's goals and the overall strategic plan.



# Reflections and Close



# Reflection & Commitment

- What was a significant learning for you?
- When reflecting about goal setting, where is your board strongest? Where is there room for improvement and growth?
- As a result of what you learned, what are 2-3 actions you can take to improve your board's goal setting process and accountability measures?



# Looking for more information?

**For more information, resources and questions please visit:**

<https://mdcharters.org/renewal-on-demand>

## **RENEWAL RESOURCES FOR MARYLAND PUBLIC CHARTER SCHOOLS**

This website is a Maryland Alliance for Public Charter Schools (MAPCS) curated page, developed specifically for Maryland Public Charter Schools operators and administrators. More resources are coming soon. Please bookmark this page and check back periodically for updated renewal resources.

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# Questions?

For any questions, please contact:

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