

Yu Ming Charter School — 5-Year Strategic Planning

Board Fellow | Strategy & Systems Design
Aug. 2024 - Apr. 2025

Context & Challenges

Yu Ming entered its strategic planning cycle facing compound, non-linear challenges that could not be solved independently:

1. Financial constraints:

- Operated within a ~\$15M public school budget heavily dependent on state funding (ADA-driven), with rising costs and declining one-time COVID relief.
- Required long-term sustainability without compromising educational quality or equity.

2. Political & governance complexity:

- Multiple stakeholders with competing priorities: board, leadership, staff, families, and community groups.
- High expectations for transparency, inclusion, and equity alongside regulatory constraints.

3. Too many priorities, not enough sequencing:

- Growth, academic rigor, DEI, staff retention, and sustainability all competed for attention.
- Risk of an aspiration-heavy strategy without execution clarity.

4. Cultural & community tension:

- Changing demographics surfaced new expectations around belonging and communication.
- Survey feedback showed strong outcomes overall but uneven experiences by subgroup.

Approach

The work focused on creating shared understanding and decision clarity rather than jumping to solutions:

1. Structured listening:

- Designed stakeholder surveys across staff, families, students, and alumni.
- Conducted focus groups to unpack conflicting signals and root causes.

2. External facilitation:

- Partnered with an external strategy consultancy to bring rigor, neutrality, and prioritization discipline.

3. Strategy architecture:

- Anchored the plan around a Strategy House and five interdependent priorities.
- Forced explicit tradeoffs and sequencing across initiatives.

4. Operationalization:

- Paired vision with owners, milestones, and financial constraints.
- Designed the strategy as an operating system, not a static document.

Outcomes

- Board-approved 5-Year Strategic Plan aligned across governance and leadership.
- Clear prioritization and sequencing across growth, facilities, talent, and sustainability.
- Improved alignment and trust through transparent articulation of tradeoffs.
- Established execution foundations through working groups, metrics, and progress monitoring.