



Getting Strategic with Planning

For Authorizers

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Dr. Liz Freeman, Superintendent
WRCCS Charter Summit
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Today we will....

Share our story

Provide context for strategic planning

Encourage collaboration and networking in this session

Highlight resources for strategic planning

Answer your questions





Cedar Grove-Belgium School District





CENTRAL GROVE-BELGIUM SCHOOL DISTRICT





CEDAR GROVE-BELGIUM SCHOOL DISTRICT







JUNE
16
2026

ROCKET VARSITY
BASEBALL



STATE BOUND

CEDAR GROVE -
BELGIUM

VS

MARATHON

FOX CITIES STADIUM | APPLETON





















Table Introductions

-Name

-Role

-Location

-When I think of strategic planning....





Human Continuum

What stage are you at with strategic planning in your district, school, or organization?





Human Continuum

What stage are you at with strategic planning in your district, school, or organization?

Fully in Place

Completed

Draft Has Been Developed

Started

Not in Sight





Human Continuum

Check in with each other.

Beginners - What might be your first step?

Advanced - What have you learned along the way?





Planning Year / Development Phase

Great! You have a concept of a school. Now how do you get the doors open?

What will we teach?

How will we teach it?

Who will teach it?

Where will we exist?

The when was the only thing we knew for sure.

Our Strategic Plan was VITAL during this phase.

[WRCCS Resources](#)



change →





Authorizer Onboarding

- Learn everything possible about charter schools and authorizing in Wisconsin.
- Listen for clarity from the Board of Education.
- Connect regularly with the Director
- Network with colleagues and other organizations





Authorizer / Charter Structures

- 1:1 meetings weekly
- Frequent collaboration with Business Office
- Authorizer rep attends every Governance Council meeting

Tap into each others' strengths





Authorizer / Board of Education Structures

- Written updates after Governance Council meetings.
- Education on charter contract.
- 6x/year updates at Board of Education meeting.
- Attendance at charter school Open House.
- New 2026: Joint Board Meeting (now in the contract!)





Operational Phase

Transition from Planning to Operational

- Continuous Growth Model
- Additional Revenue Sources
- Changes to Curriculum
- Expand our Recruitment Radius
- New Pathways to Offer





What prompted strategic planning?

- Students were in our school
- Governance Council members were seeking to evolve from a “start up” to a more established school
- Strategic planning was in place at the authorizer district
- Clarity, vision, focus





Turn and Talk: What is the purpose of a Strategic Plan?





Pre-Strategic Planning

- Determine your goal
- Determine your output or deliverable
- Consider working with a WRCCS consultant
- Develop a team





Consultants for Strategic Planning

Advantages

- Objective outside perspective
- Specialized expertise in structured processes
- Efficient goal setting
- Brings credibility to the process
- Allows leadership to engage in the process

Disadvantages

- Potential misinterpretation of insights as criticism
- Can be expensive
- Risk of strategy appearing "disconnected" from the work
- Dependency on external facilitators for long-term support



Implementation Plan Evaluation Process

- Specific Activities and People Responsible (updated annually) to remain aligned with the strategic plan while understanding the organization's current state.
- An annual update to the implementation plan also helps to reinforce the idea that the strategic plan is a living document, and this annual review can become a part of the board's annual calendar.
- Develop a process for evaluating progress and measuring success against the strategic plan goals, objectives, and strategies.

[Document](#)

EXIT



Chamomile

Strength

Contextual Skills

attitude

Excellent Governance

Desire For Right Things Right Reasons

Adaptability

Teachers upskill themselves for students & employers

Roll enrollment from many schools

Company Engagement

Early signs of success

Being Small - just react - invisible quietly

Student Workforce Connection

Diverse group

Industry Partnerships

School & Board have the ability to self promote

Close knit group

"can do" attitude

Relationship w/ District

Partnerships WITH OTHERS

Dist W Part

Developing Partnerships (non-formal)

what's been done

Leadership

initiative

Staff of Pocket A

Ability to place students into work (YA)

More

innovative

passion

collaborative

Engagement and support from Lakeside & Lakeside II

Have done exp

attitude

Parent Feedback

Collaboration of Board

Weaknesses

Operational Budget

What does board decide vs what does Dard decide?

Timely Progress or Capital Campaign

Access to All Required Resources

long term planning

proactive

Being small & new - can't offer every thing that standards want

Goals / targets we can measure or those are needed

Resource limitations

Keeping momentum through the development phase

LIMITED RESOURCES

may be a blind side to positive attitude -

need for solid project planning

Who leads/ leads what

Lack of staffing

Because of casual can-do doesn't hurt planning/ execution

SPED Support

Tried me to Do too many things

ambitious planning to fast

Economic Sustainability

Opportunity

NAME RECOGNITION OF R.A.

NEW PARTNERSHIPS

Opportunity to Scale What we are good at

EXPANSION
BRANCH OUT TO OTHER FACILITIES

LONG TERM FUNDING
FUNDRAISING ACTIVITIES

Willing higher-ed partners

Grant funds impacted positively from change in administration

The Community is Incredibly generous

LARGER CURRICULUM

Help for starting up looking different from help for keeping it going

Changes in degree requirements or teaching requirements

Business is educational infrastructure that embraces work-based learning

Large number of family-owned and run micro/small brands in region

New Tech Center

Job placements and Youth Apprenticeship

Many many businesses want to connect

Job Placement Partnership for Students (JPS)

RECRUIT OTHER DISTRICTS

We could potentially live up more business

Relevant special dist. can help

Economic Resiliency

Microbusinesses (under \$500)

Lack of available data

Volatility in market

Threats

name recognition / branding negative happens

Changes in industry - growth / non growth of manufacturing

Changes in teacher requirements

Some districts can see us as meeting their standards

Lack of capacity to work w/ all the vendors

Changes in req. requirements

Students leaving job placements

Challenging educational landscape K-12: higher ed other school district may not support

What strategy would be "competitive" by the districts

Ability for license checks that leads to the approval opportunities of placement

Gov changes to charter schools

automation

Economy

Economic Workforce - requirements - funding

Too many schools try to replicate model

Overlapping as a competitor too many decisions to go in

Lack of help in certain fields

COMPANIES NOT HAVING YOUTH

PERMISSION SLIP

CHANGE IN FOCUS ON BUSINESS TRAINING

JOB PLACEMENT

STUDENT FAILURE

Not being able to work on our timeline

No or not enough funding

Overlapping districts doing the same thing or doing it differently

if partners not strong and who we're not meeting their expectations

Perception of the target audience of students.

Districts not wanting to "lose" students.

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[Document](#)

EXIT



Chamomile



Rocket Academy Continuous Improvement Plan

Mission: Close the college and career readiness achievement gap so that all students are prepared to successfully take the next step in their own skilled manufacturing career pathway by graduation.

Vision: Rocket Academy will provide relevant, technology-based education that prepares students in grades 11 and 12 for college, careers, and the global community.

Core Values: Redefining College and Career Readiness
Equity in Opportunity
Industry & Postsecondary Partnerships

CORE AREAS							
Learning & Academics		Operations & Fundraising		Engagement & Partnerships		Governance	
College Credit or Work Experience	15%	Fundraising	15%	Advisory Committees	15%	Guidance Documents	10%
Safe and Responsible Workplace Practices	15%	Enrollment	15%	Industry Partnerships	15%		



District Improvement Plan





Table Exploration & Discussion

Explore multiple strategic plan core areas.

Discuss your observations.

Apply this exploration to your own context.

- Do you still need to determine your core areas?*
- If you have your core areas, how did you choose them?*
- Do any of your core areas need attention?*
- Is there alignment between the charter school and the authorizer?*





Strategic Plan: Purpose and Limitations

A Strategic Plan DOES

- Provides a roadmap for the future
- Aligns resources with priorities
- Sets measurable goals and objectives
- Clarifies organizational mission
- Focuses decision-making

A Strategic Plan DOES NOT

- Predict the future with certainty
- Replace daily operational management
- Solve every immediate problem
- Function as a static document
- Guarantee success without execution





Strategic Planning: Finance

- Frequent meetings district/director
- Regular forecasting
- Significant autonomy over school budget
- Compliance with state, grant, and other parties





Strategic Planning: Human Resources

- Staffing similar to district schools
- Creativity with licensure due to unique school model
- “Concierge support” for non-traditional educators
- Inclusion in district mentor program and other district PD programs





Strategic Planning: Partners

- Lakeshore College
- Sheboygan Area, Ozaukee County & Belgium Area Chambers of Commerce
- Business Partners
- Community Partners
- Generous Landlord / Local “Angel Benefactor”





Strategic Planning: Community Interactions

- Partnership with local restaurant to manufacture tables
- Entry in parades - Belgium European Christmas Parade, Fish Days, etc.
 - Name recognition
 - Advertising for enrollment
- Business & Industry Tours
 - Manufacturers get to know our students
 - Students get to know manufacturers





Charter School Director Cautions

You're going to get a lot of input and ideas.

- Be wary of those who want pet projects that don't align to your mission
- Every stakeholder will want something different. K.I.S.S.
- Don't get too carried away with the word "Autonomy."





Charter PD

<https://www.wrccs.org/services/charter-pd.cfm>





Authorizer CharterPD Badges

- Authorizing Practice
- Community Engagement
- Culture
- Equity
- Legal
- Performance Monitoring and Accountability
- Strategic Planning





Turn and Talk:

What is one next step or connection you can commit to related to strategic planning?





Thank you!
Come visit us!

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