

# **USBE Strategic Planning Workshop Enhanced Notes**

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## Executive Summary

The Utah State Board of Education (USBE) convened a strategic planning workshop on August 22–23, 2025 to establish a clear, unified direction for the Board’s work over the coming years. The intended outcome of the workshop was to identify aligned values, understand the role of the Board, review and refine the Board’s existing mission and vision, identify 3–5 strategic goals, and develop supporting priorities.

Mighty Penguin Consulting partnered with USBE to facilitate the planning process, ensuring a structured and outcomes-focused experience. Mighty Penguin designed and administered pre-retreat surveys to the Board, analyzed input, and prepared workshop facilitation tools—such as interactive exercises and worksheets—to ensure all intended outcomes were captured.

The survey and workshop revealed strong shared Board values around academic proficiency and achievement, educator quality, data integrity, fiscal responsibility, internal controls, and parent engagement. These aligned values informed both the workshop and the breakout discussions.

During the two-day retreat, the Board worked collaboratively to review survey findings and identify and refine strategic goals and priorities based on their individual input. The Board aligned on five key pillars of focus to guide its strategic goals, including:

- Academics: Standards & Assessment
- Educator Quality / Effectiveness
- Internal Controls / Fiscal Responsibility
- Academics: Intervention & Early Support
- Parent Role & School Safety

The strategic planning workshop concluded with agreement on a shortlist of draft strategic goals and priorities, which are outlined in the first section below. These aligned goals and priorities will serve as the foundation for formalizing the strategic plan.

Following the strategic goals and priorities section, this *Enhanced Notes* document will provide a more detailed account of the strategic planning objectives and process, including next steps and implementation. It will also include a report of survey results, the workshop agenda and attendee roster, session notes, presentation materials, and any data provided to Board members prior to the start of the workshop.

## Strategic Goals and Priorities

After aligning on these key focus areas—Academics: Standards & Assessment, Educator Quality / Effectiveness, Internal Controls / Fiscal Responsibility, Academics: Intervention & Early Support, and Parent Role & School Safety—Board members identified the following goals and with their associated actionable priorities. Note that board members were instructed that the **goal should describe what they want to achieve**, and **priorities are the actionable steps to attain the goal**.

### **Focus Area 1: Academics: Standards & Assessment**

**Goal:** Elevate student learning

**Priorities:**

- Clear standards that define knowledge, skills, and expectations for educators, parents, and students
- Parent supports – relevance of education, understanding standards and assessments, parent rights and responsibilities
- Rethinking assessments – using assessments to inform instruction, support parents in supporting their students with personalized feedback.

### **Focus Area 2: Educator Quality / Effectiveness**

**Goal:** Promote educator quality and effectiveness

**Priorities:**

- Identify effective teachers in various subject areas and incentivize them to share their skills with educational professionals throughout the state.
- Eliminate licensing barriers to attract qualified professionals to public education.
- Advocate for more competitive teacher compensation packages. Emphasizing starting salaries and retention of quality teachers.
- Innovative practices to create flexibility and support systems to attract and retain professionals.

### **Focus Area 3: Internal Controls / Fiscal Responsibility**

**Goal:** Oversight and Accountability

**Priorities:**

- Clearly communicate required expectations
- Increase risk identification & assessment

- Monitor & support LEAs to ensure compliance
- Direct performance improvement steps up to corrective action

**Focus Area 4: Academics: Intervention & Early Support**

**Goal:** Establish statewide, effective interventions and early support to close learning gaps

**Priorities:**

- Teaching and Learning Infrastructure:
  - Ensure all schools have the resources, training, and accountability structures necessary to implement effective early academic interventions.
  - Identify classroom based, systematic progress monitoring and intervention opportunities.
  - Deliver Targeted Interventions: Train educators on focused, adaptable, structured teaching and learning (explicit instruction) and behavior mitigated classrooms.
  - Advance the understanding that Multi Lingual Learners support systems can improve every student's learning.
- Address non-academic barriers to learning through integrated student support systems.
  - Expand access to whole student supports, including counseling, mentoring, and family accountability, engagement, and communication.
- Equip educators with a variety of interventions to accommodate a diverse learning community.

**Focus Area 5: Parent Role & School Safety**

**Goal:** Respect our shared partnership with parents by keeping students safe and working together for an exceptional school experience.

**Priorities:**

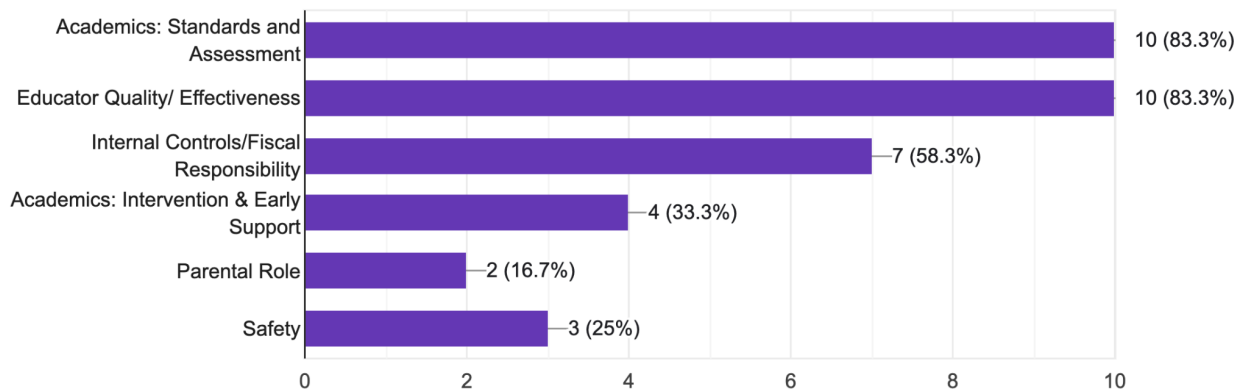
- School personnel, parents, police work together to create safety protocols. (violence, bullying and predators.)
- Academic, Disciplinary and Safety policy and procedures are clear, well communicated and applied with consistency
- Increase academic time when you reduce behavioral distractions (USBE Trainings)
- Model user-friendly ways to communicate with parents in writing, especially about finances, taxation, initiatives and curriculum.
- Create a model policy about how to make schools more supportive and inviting.

The Post-Workshop Survey indicates that board alignment is strongest around the following goals:

1. Academics
2. Educator Quality
3. Internal Controls/Fiscal Management

In your opinion, what are the three most crucial goal areas that USBE should address? Please check only three.

12 responses



After reviewing feedback given by the board during the Workshop and in the Post-Workshop Survey, Mighty Penguin facilitators have prepared the following edited goals and recommend the following goals and priorities be considered for vote at the USBE Meeting on September 4, 2025. Included in the notes under each goal are the considerations expressed by Board members during the Workshop for the implementation of these goals and priorities.

### Focus Area 1: Academics: Standards & Assessment

**Goal:** Elevate student learning

**Priorities:**

- Simplify standards that define knowledge, skills, and expectations for students, educators, and parents for greater efficiency and effectiveness.
- Audit assessments to ensure they inform instruction and provide families with personalized feedback that helps them support their students' learning.
- Enhance instruction by identifying, supporting, and scaling effective teaching practices that optimize student learning and academic outcomes.

- Close learning gaps with support for timely learning intervention initiatives and programs.

**Note 1:** The “Academics: Intervention and Early Support” focus has been incorporated into this goal.

**Note 2:** Feedback to consider in implementation included:

- Keeping assessments narrow in scope, few in number, and focused on measuring true academic growth rather than external data.
- Providing clearer guidelines on how assessments demonstrate the success of standards, ensuring the data gathered is accurate and actionable.
- Avoiding standards that stifle innovation and allowing teachers greater flexibility to create and teach.
- Offering more instructional training and support for educators to strengthen teaching practices and student outcomes.

## **Focus Area 2:** Educator Quality/ Effectiveness

**Goal:** Promote educator quality and effectiveness

### **Priorities:**

- Establish systems that identify and recognize highly effective educators, and enable them to share best practices and mentor educators statewide.
- Reduce licensing barriers to attract qualified professionals to public education.
- Attract and retain high-quality educators:
  - Advocate for competitive compensation packages to improve quality educator retention rates.
  - Support flexibility in systems to allow for more innovative practices.
- Enhance professional development and evidence-based educator training to strengthen teaching and boost student outcomes.

**Note 1:** Feedback to consider in implementation included:

- Expanding ideas into concrete tasks and action steps.
- Developing trainings on standards that also respond to teacher needs identified through surveys.
- Setting a sunset or adjustment for certain trainings for veteran teachers.
- Exploring options like childcare, coteaching, or other supports that add flexibility for educators.

- Prioritizing instructional strategies in professional development, including explicit instruction, classroom management, the science of learning, and classical education approaches.
- Ensuring teacher accountability to content knowledge and high standards of professionalism.

**Focus Area 3: Internal Controls/Fiscal Responsibility**

**Goal:** Optimize oversight and accountability

**Priorities:**

- Clearly communicate required expectations
- Increase risk identification & assessment
- Monitor & support LEAs to ensure compliance
- Direct performance improvement steps up to corrective action

**Note 1:** Feedback to consider in implementation included:

- Emphasizing the preservation of limited funds for students in classrooms.
- Offering support to help LEAs achieve compliance after audits, with clear, step-by-step assignments tied to audit findings.
- Ensuring the superintendency plays a central role in crafting strategies.
- Recognizing that while the plan should be robust, streamlining language is not necessary—finance is distinct from other areas (e.g., special education), and that difference is acceptable.
- Organizing this work clearly, as it represents where “the rubber meets the road,” and ensuring the Board has a deeper understanding of it.
- Striking the right balance of support, training, and accountability for LEAs.

**Focus Area 4 Note:** In response to feedback from the in-session Menti exercise and the Post-Workshop survey, we have added a priority from this focus area to the goal “Elevate student learning,” and eliminated this as a standalone goal.

**Focus Area 5 Note:** Under the area of “Parental Role and Safety,” an overwhelming majority of the feedback was cautionary against pursuing initiatives addressing parental culture. Many feel it’s outside the scope of USBE and is more appropriately addressed by LEAs. There were also multiple requests to separate Safety from Parental Role. Consequently, we have removed Parental Role from the suggested goals and recommend that, if there is alignment on the focus area, the Board make “Safety” a separate focus area. Consistent with board feedback, a goal in

this area could read, “Increase safety in schools,” and be addressed with a priority such as “Create a model policy to improve safety protocols that engages educator, parent, police collaboration to keep students safe from violence, bullying, and predators.”

*\*Please note that all feedback from the Workshop and Post-Workshop Survey that shaped all edits is included in the Appendix of this document.*



## Mission and Vision Analysis

Addressing alignment for the current Mission and Vision Statements was considered a possible secondary goal of this Workshop. A clear vision and mission are important as they serve as a foundation for direction and provide a unifying framework for decision-making, priorities, and long-term success. For USBE, its mission and vision must also be consistent with the powers and duties that are defined by state code.

Given the time constraints of the Workshop—and in line with the majority of feedback received in the pre-workshop survey—the facilitators determined it would be most effective to present a limited set of mission and vision options. These options prioritized retained the existing language, with adjustments made to address comments regarding the order of the statements and to clarify that the mission and vision prioritize a focus on students. The options provided to Board members for ranking were included in their *Survey Results and Worksheets* packet.

Prior to the Saturday afternoon session, Joseph Kerry and Cindy Davis submitted suggested additions and complete revisions via email (included in the appendix). This prompted the facilitators to adjust their approach and first assess whether Board members preferred one of the four following options:

1. Leaving the mission/vision statements alone
2. Making small tweaks to the current statements, as suggested in survey results
3. Adding limited additional content to the existing bullet points
4. Making major content changes, restarting mission and vision process

Option Two received the highest ranking but did not secure a majority. The group then chose to rank the facilitator-suggested edits and vote on whether to adopt the top option or restart the process at a later time. Ten Board members identified Alternate Version 4 as their preferred Mission and Vision Statement. In the subsequent vote, seven members supported keeping Alternate Version 4, while five favored starting over.

This remains a point of tension among the Board with many members who participated in developing the current mission and vision favor making only slight adjustments to strengthen alignment, while some newer members feel the existing statements do not adequately reflect the content they would like to see included.

**Alternate Version 4:** Rewritten to switch the existing Mission and Vision statements, as well as include “Utah graduates” in the Vision to improve clarity on how the bullet points relate to the lead statement in the Vision.

Vision: To open doors of opportunity for all Utah children:

- Utah graduates participate in civic responsibilities
- Utah graduates uphold and strengthen our constitutional republic
- Utah graduates provide for themselves and their families
- Utah graduates engage in post-secondary opportunities
- Utah graduates pursue personal goals and aspirations
- Utah graduates embody strong moral and social values

Mission: To advance academic and organizational excellence in Utah education:

- Set academic standards
- Protect information systems
- Manage public education funds
- Develop policy for education
- Advocate for Utah students
- Provide support and oversight of schools

## Strategic Planning Overview and Process

The strategic planning process and workshop were designed to provide the Utah State Board of Education (USBE) with a clear, actionable framework for guiding its work over the coming years.

The strategic planning overarching objectives included:

- Identifying three to five strategic goals
- Developing supporting priorities
- Reviewing and refining the Board’s existing mission and vision
- Fostering alignment among Board members

This process aimed for the resulting strategic plan to be actionable, measurable, and reflective of aligned values.



A critical component of the process was the pre-workshop survey, which collected anonymous input from all Board members on four key areas: values, mission and vision, the role of the Board, and potential goals and strategies. Twelve completed surveys were received. Survey highlights included:

- **Section One – Values:** Members ranked foundational values such as academic proficiency, educator quality, fiscal responsibility, and parent engagement, with space to suggest additional values.
- **Section Two – Mission and Vision:** Assessed clarity, alignment with external expectations, and actionability.
- **Section Three – Role of the Board:** Explored authority, responsibilities, relationships with staff, LEAs, and the Utah State Legislature, and suggestions for enhanced collaboration.
- **Section Four – Goals and Strategies:** Asked members to identify priorities, challenges, and operational strengths/weaknesses to guide development of measurable strategic goals.

Survey responses were synthesized into a presentation to inform interactive discussions during the workshop.

During the two-day retreat, Board members used survey results as the foundation for structured, collaborative exercises. Key aspects of the agenda included:

- Review of survey findings
- Breakout group activities to develop and refine goals
- Full-group presentations and discussions
- Ranking exercises to prioritize strategic goals

On **Day One**, the Board was divided into five groups of three. Each group:

- Developed goals they deemed most important
- Presented their proposed goals to the full Board and responded to questions
- Participated in ranking, producing eleven top-ranking goals for further review

On **Day Two**, the Board revisited the eleven highest-ranking goals, organized under five categories:

- Academics: Standards & Assessment
- Educator Quality / Effectiveness
- Internal Controls / Fiscal Responsibility
- Academics: Intervention & Early Support
- Parent Role & School Safety

Breakout groups were assigned a category and tasked to:

- Select and refine **one top goal** for their category
- Brainstorm supporting priorities for each goal

At the conclusion of the breakout sessions:

- Each group presented their finalized goal and priorities to the full Board
- Additional insights were incorporated, where possible, to ensure alignment with Board input and shared values
- Further alignment on a draft strategic goals and initial priorities, which will serve as the foundation for the formal strategic plan

Mighty Penguin analyzed input collected throughout the strategic planning process, including real-time feedback during the workshop via Google Forms, verbal comments, and interactive exercises conducted through Menti, a digital tool for polling, ranking, and feedback. To further facilitate dialogue and confirm alignment after the workshop, Mighty Penguin distributed a post-workshop survey to the full Board, asking members to rate on a 10-point scale how aligned they felt with each of the **top five goals** and its supporting priorities. The results indicated that certain goals received the highest alignment ratings, while others ranked lower in alignment. Based on these findings, Mighty Penguin has organized the goals and priorities into a clear structure, preparing them for the Board's final review and voting process.

## Next Steps and Implementation

This section outlines the actions and processes necessary to transition the Board's suggested strategic goals and priorities into a finalized, clear, actionable strategic plan for staff implementation. These steps include:

- **Formal adoption of the strategic plan:** The Enhanced Notes document, including draft goals and priorities, will be presented for review and approval at the **September 4th** Board meeting. A final vote will confirm the strategic goals and priorities.
- **Operational planning by staff:** Upon adoption, USBE staff will create an implementation roadmap that includes:
  - Detailed tasks and action steps for each strategic priority.
  - Timelines and milestones to monitor progress.
  - Responsible parties and roles for accountability.
  - Resource allocation to support implementation.

By establishing clear responsibilities, timelines, and monitoring practices, USBE can ensure the strategic plan is effectively executed, measurable, and aligned with the Board's mission and vision.

## Prepared By

This Enhanced Notes document was prepared by Mighty Penguin Consulting, the Strategic Planning Consulting Firm supporting this process:

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- **Anna Habben** – Senior Strategic Planning Consultant  
*anna@mightypenguinconsulting.com*
- **Jill Colby** – Client Manager  
*jill@mightypenguinconsulting.com*


We are honored and grateful for the opportunity to partner with the Utah State Board of Education in shaping its strategic direction.

## Attachments

### Pre-Retreat Survey Results

This information was presented to Board members at the USBE retreat. It contains a synthesized version of the Board member responses to and result from the Pre-Retreat Survey (submitted on August 12, 2025) and compiled to highlight key points of board alignment, underlying tensions, and comprehensive view of the work of the Board as it relates to key stakeholders.

 [USBE Survey Questionnaire.pdf](#)

 [USBE\\_ Survey Results and Worksheets.pdf](#)

### Workshop Attendee Roster

#### USBE Board Members:

Amanda Bollinger, District 9  
Carol Lear, District 6  
Christina Boggess, District 8  
Cindy Davis, District 11  
Cole Kelley, District 12  
Emily Green, District 14  
Erin Longacre, District 7  
Jennie Earl, District 1  
Joann Brinton, District 15  
Joseph Kerry, District 2  
LeAnn Wood, District 4  
Matt Hymas, District 10  
Randy Booth, District 13  
Rod Hall, District 3  
Sarah Reale, District 5

#### USBE Staff

Molly Hart, Superintendent  
Elisse Newey, Deputy Superintendent of Policy  
Leah Voorhies, Interim Deputy Superintendent of Student Achievement  
Kesley James, Board Communications Coordinator  
Cybil Prideaux, Board Secretary




### Facilitators

David Driggs


Anna Habben


Jill Colby (remote)

### **Workshop Agenda**


 USBE Workshop Agenda (1).pdf


### **Presentations From Day 1 And 2**

 USBE Presentation Day One.pdf

 USBE Presentation Day Two.pdf

### **Breakout Group Google Form Results From Day 1 And 2**


 USBE Suggested Goals (Responses) Day 1

 Day Two (Responses)

### **Retreat Session Notes**

 USBE Workshop Session Notes.pdf

### **Post-Workshop Survey**

 USBE Post-Workshop Survey Results.pdf

### **Mission and Vision Emails**

 Re\_ Some Vision\_Mission Minor Adjustments to consider.pdf