



# Strategic Planning Preparation Project | Part A

**Strategic Planning Facilitation & Consulting Proposal Overview**  
*Support Board of Trustees & Administrative Leadership Review of Prior Plan and  
Potential Action Items as Foundation for Part B Community Outreach (2022-2023)*

# INTRODUCTION & OVERVIEW

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Living Strategy provides products and services to make strategic planning more efficient, effective, and collaborative than traditional methods resulting in plans that are clear, concise, and actionable.

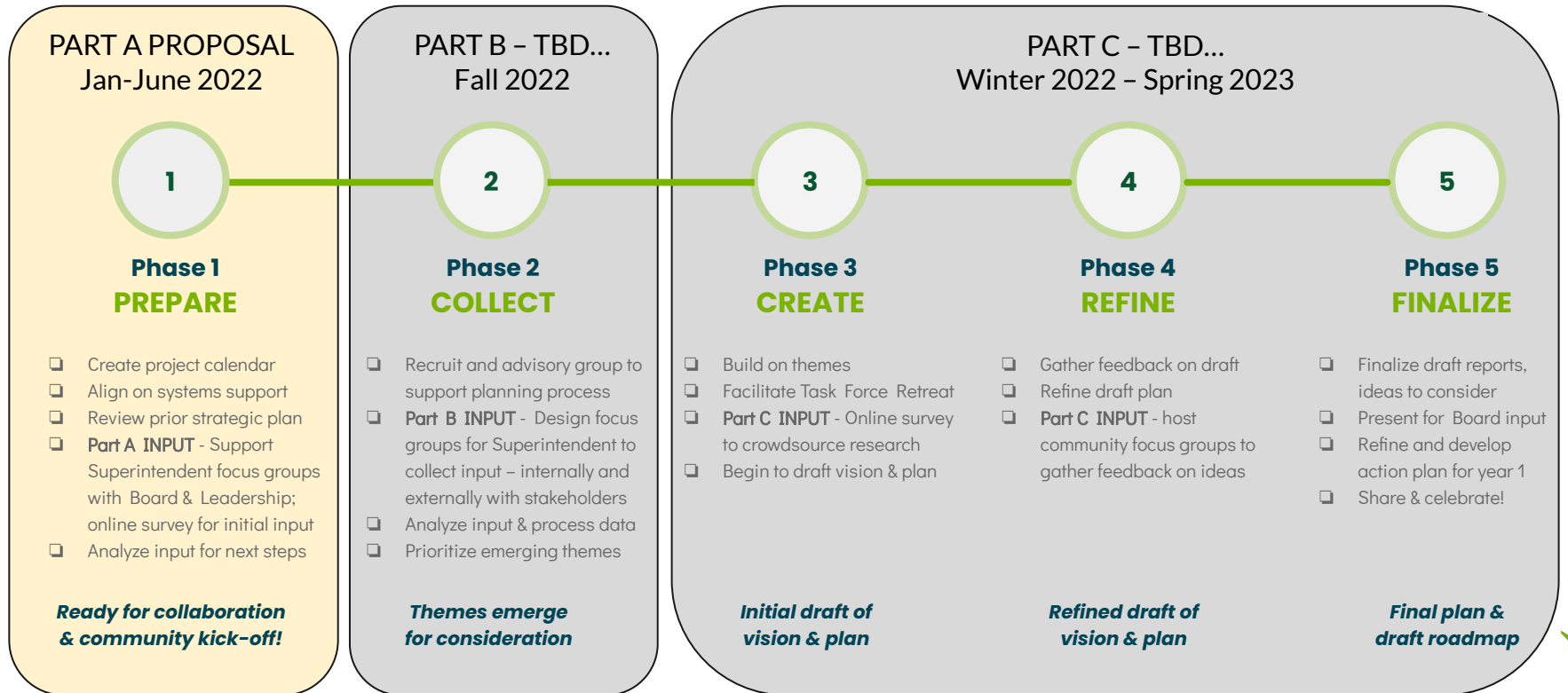
We specialize in helping K-12 school leaders create and implement strategic plans with an inspirational vision to support the students you serve and that is responsive to stakeholder needs and interests.

- Our senior-level consultants bring experience in educational organizations, non-profit leadership, and industry roles.
- Primary services include: project management, data analysis, stakeholder focus groups, task force facilitation, leadership development, and communications.



# TTUSD PROPOSED PROJECT | OVERVIEW

Given the current context, continued disruption from the pandemic, demands on Board, administrative, and stakeholder time, Living Strategy facilitators recommend TTUSD consider completing a 5-phase strategic planning process in three parts (A, B, C). This would enable adequate time for reflection and assessment, as well as community collaboration to inform next steps & vision.





# YOUR STRATEGY TEAM



## Lana Guernsey

Lana brings 20+ years experience in education as a consultant, facilitator, teacher, and administrator. She has worked with many of the most innovative public, charter, and independent schools in Silicon Valley. She currently teaches communications at Design Tech High School on the Oracle campus, and her **TEDx** talk – *Earthquake: Harnessing Moments that Move You* – inspires individuals to take action on their ideas. Prior to her education career, she worked in life sciences and biotechnology and has a Master’s degree in Management and a Certificate in Public Management (NPO Leadership) from the Stanford Graduate School of Business and a Bachelor’s degree in journalism from U.Missouri.

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## Gilbert Wai

Gilbert has a broad range of strategy and leadership expertise from public education governance, non-profit strategic planning, and high technology. He is a trustee on the Hillsborough, CA school board, where he was board president and serves on the District Visioning, Finance, and Communications board committees. Gilbert is a proven Silicon Valley engineering executive with Senior VP roles in engineering and product development leadership at high growth, venture-backed startups through two IPOs and one acquisition. He has a Bachelor’s degree in Electrical Engineering and Computer Sciences from University of California, Berkeley.

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## Christine Egy Rose

Christine is a leader, strategist and communicator who has spent 20+ years working in education, technology and media. She was the founder and CEO of Scoot & Doodle, an education technology company, pioneering collaborative, immersive learning for a new generation of digital learners. Prior to that she was a digital media leader and journalist, served as director/producer in “NBC Nightly News” and an Emmy-nominated broadcast producer for NBC’s “Meet the Press”. She has served on the boards of several educational and child-focused non-profits and has a Bachelor’s degree in Journalism from the University of Missouri-Columbia.

[LinkedIn link Christine Egy Rose](#)

## SAMPLE CLIENTS



# CORE VALUES GUIDE OUR WORK

## COLLABORATIVE

We believe strategic plans based on collaborative community input help school leaders & trustees create vision that inspires communities and mobilizes resources for the students you serve.

## INCLUSIVE

We work hard to include various and diverse stakeholders from across the organization and encourage participation in the planning process, while maintaining momentum. This helps to build community around shared, visionary work.

## ENGAGING

We believe strategic planning is fun and engaging when community members and volunteers feel heard and valued. We honor their time and talents by helping to manage and coordinate efficient & effective project plans.

## ACTIONABLE

It is very important to our team that we are driven by a sense of purpose and action to move your projects forward as efficiently and effectively as possible and that all of our plans include concrete next actions toward your goals.

For more information regarding Living Strategy, please contact: [ana@livingstrategy.net](mailto:ana@livingstrategy.net).

