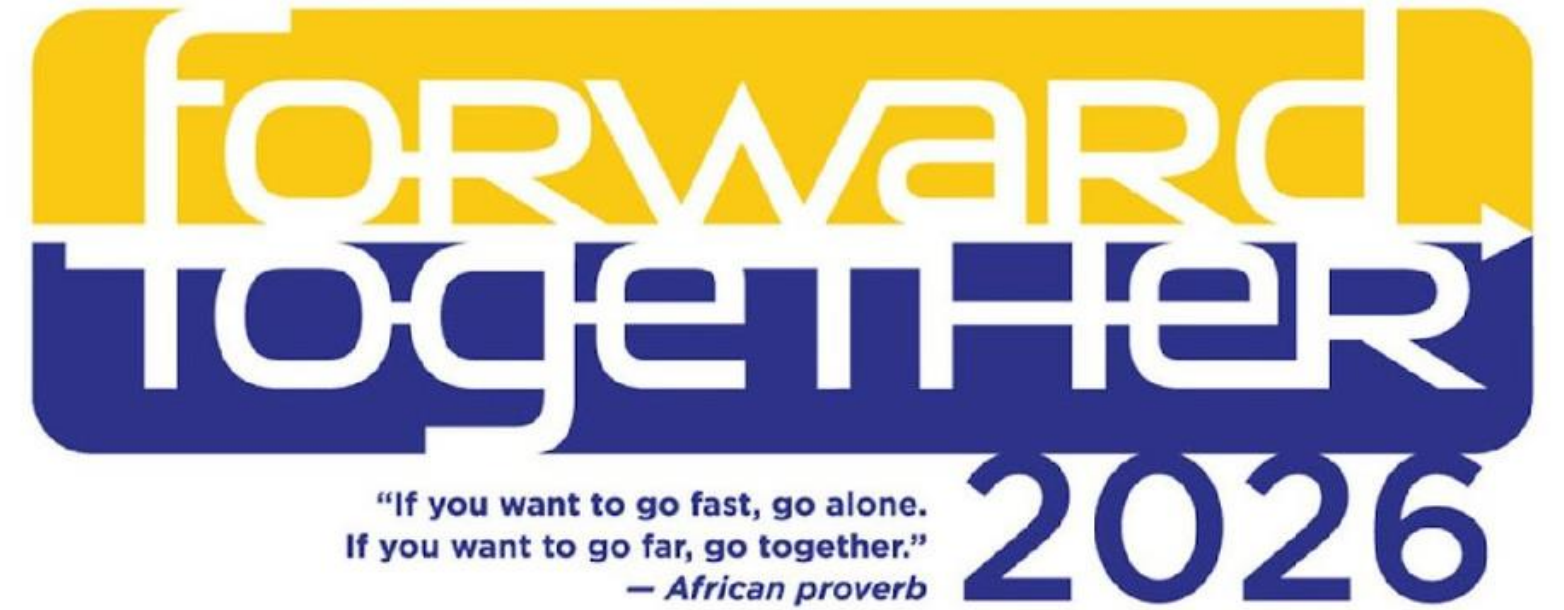




Colorado Charter Schools Annual Conference

February 25-27, 2026
Denver Marriott Tech Center



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Leading with Intelligence: Strategic Planning in the Age of AI

Jen Wickens, Co-Founder & Co-CEO
Seminar

Larkspur
February 27, 2026 | 1:30 – 2:30 PM
Technology & AI



“
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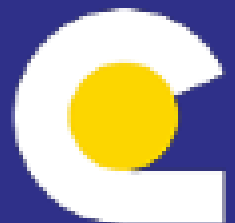


Thank you.

Zone Sponsor



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Colorado League of
Charter Schools



We make it our priority to **advocate** for high-quality public charter schools across Colorado.



Be a part of the action.



Welcome!

Get ready to share:

What's your current relationship with artificial intelligence?

Given the AI transformation underway, how are you positioning yourself and your organization?

Leading with Intelligence: Strategic Planning in the Age of AI

Colorado League of Charter Schools Conference

February 27, 2026

Welcome & Connection



Jen Wickens

Seminar Co-CEO & Co-Founder

Welcome & Connection

**Stand up, pair up & share:
Your role, organization and location**

x0000

What's your current relationship with artificial _x0000_
intelligence?

Given the AI transformation underway, how are you _x0000_
positioning yourself and your organization?

Session Objectives

1

Understand how AI can support data-driven leadership and strategic planning in charter schools.

2

Explore the opportunities and risks of AI in decision-making and leadership processes.

3

Leave with concrete strategies to integrate AI as a tool to accelerate vision-setting, planning, and continuous improvement cycles.

Session Agenda

1

Welcome & Connection (10 min)

2

Organizational AI Readiness Assessment (10 min)

3

AI in Action: Use Case Studies (15 minutes)

4

Application: Automating a Workflow (15 min)

5

Small Group Discussion (5 minutes)

6

Closing Reflection (5 min)

Organizational AI Readiness Assessment

AI ORG COMPETENCIES

Leadership Reflection

Evaluates how leaders are personally engaging with AI concepts, modeling learning, and setting the tone for responsible AI adoption across the organization.

AI Strategy, Policy & Security

Assesses the presence of a clear organizational vision for AI, supported by robust policies, governance structures, and security protocols.

AI Knowledge and Expertise

Measures the organization's collective understanding of AI technologies and its access to skilled talent for AI exploration and implementation.

AI Data Science and Model Development

Examines the organization's capacity to build, train, validate, and maintain AI models using sound data science practices.

AI Integration and Adoption

Looks at how well AI tools and solutions are embedded into day-to-day operations, workflows, and decision-making processes.

AI Performance and Scaling

Evaluates the organization's ability to monitor AI impact, optimize performance, and scale successful use cases across teams or functions.

AI Ethics and Trust

Focuses on how the organization ensures fairness, transparency, accountability, and community trust in its AI systems and practices.

Change Management for AI Adoption

Assesses how effectively the organization supports people through the mindset, role, and workflow shifts that come with AI transformation.

Organizational AI Readiness Assessment

Take 5 minutes and complete the assessment. Review your score summary and next steps on the second tab.

Directions: Review each statement or prompt. Rate on a scale of 1-5 with 1 representing the need for significant development and 5 representing an exemplar. Feel free to capture evidence and/or notes in column D.

| Section | Statement / Prompt | Org Rating (1-5) |
|---------------------------------------|--|------------------|
| Leadership Reflection | We believe AI is primarily a technical tool, not a leadership concern. | ▼ |
| | We assume current systems/processes will remain effective with minor AI adjustments. | ▼ |
| | We believe our team lacks the capacity to adapt to AI trends. | ▼ |
| | We are waiting for clearer policies/regulations before taking action. | ▼ |
| | We have internal stories or fears that are shaping our inaction and/or caution. | ▼ |
| AI Strategy, Policy & Security | We have a clear and communicated AI strategy. | ▼ |
| | AI governance is part of our ongoing dialogue at senior levels of the organization. | ▼ |
| | We comply with emerging data laws and ethical AI frameworks. | ▼ |
| | Cybersecurity and data protection protocols are AI-aware. | ▼ |
| AI Knowledge and Expertise | We provide ongoing AI professional development for leaders and staff. | ▼ |
| | Our recruitment strategy includes AI and data science expertise. | ▼ |
| | We maintain partnerships with AI research institutions or startups. | ▼ |
| | We are clear on which resources to utilize for regular AI insights as it evolves. | ▼ |
| AI Data Science and Model Development | We use reproducible and explainable AI data models (think tech infrastructure) | ▼ |
| | Our data is accessible, high quality, and responsibly sourced. | ▼ |
| | We have model testing and validation protocols. | ▼ |
| | AI is integrated into key workflows or decision-making processes. | ▼ |
| | We actively measure AI's impact on operations and outcomes | ▼ |

Small Group Discussion



5

minutes

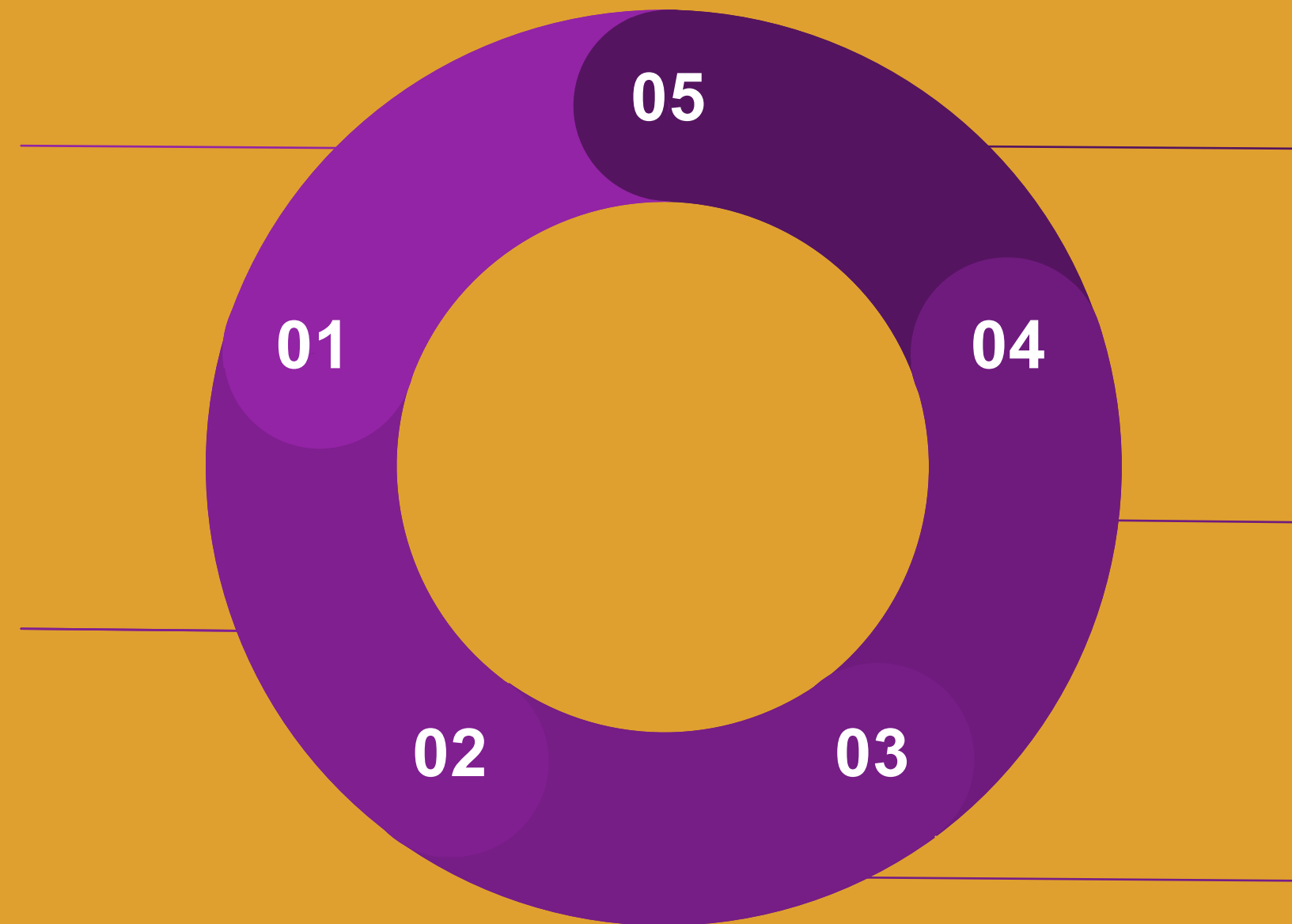
*In what area is your organization facing
the biggest need?*

*Where is your organization currently
primed to succeed?*

5 Key Steps to Activate Your Org

Cultivate a Clear, Mission-Aligned Vision
Define what readiness means in your context

Build Foundational Digital Infrastructure
Ensure systems are secure, scalable, and cloud-based



Pilot & Scale Responsibly
Start with low risk, high impact pilots

Foster a Culture of Inquiry
Determine where AI may or may not belong in your org

Strengthen Internal Capacity
Encourage experimentation & identify early adopters

AI in Action: Use Cases

Use Cases

Strategic Planning

Data-Driven Leadership

Continuous Improvement

Strategic Planning

Seminar Sage

Final Attendee-Facing Agenda: Vision-Led Strategy

Day 1: Vision Alignment and Strategic Priorities

| Time | Session Title | Focus Area |
|---------------|--|--|
| 8:30 - 9:00 | Opening and Context Setting | Retreat purpose, team alignment, and organizational performance overview |
| 9:00 - 10:30 | Vision Alignment and Aspirational Goals | Clarifying our organizational vision and aspirational outcomes for 2024-25 |
| 10:30 - 10:45 | Break | |
| 10:45 - 12:15 | Draft Strategic Priorities for 2024-25 | Identifying and building consensus on 3-5 potential strategic priorities |
| 12:15 - 1:15 | Lunch | |
| 1:15 - 2:45 | Team Building and Relationship Strengthening | Deepening trust, understanding working styles, and strengthening collaboration |
| 2:45 - 3:00 | Break | |
| 3:00 - 4:30 | Leadership Development: Accountability and Ownership | Building leadership capabilities around accountability and follow-through |
| 4:30 - 5:00 | Day 1 Reflection and Preview | Synthesizing insights and previewing Day 2 |

Day 2: SWOT Analysis, Strategy Refinement* and Implementation Planning

We can use GPTs to help design and lead effective annual retreats that balance honest reflection, strategic analysis, and forward planning.

Seminar AI team has built out a GPT accessible in Seminar Sage that can be used to help you:

x0000

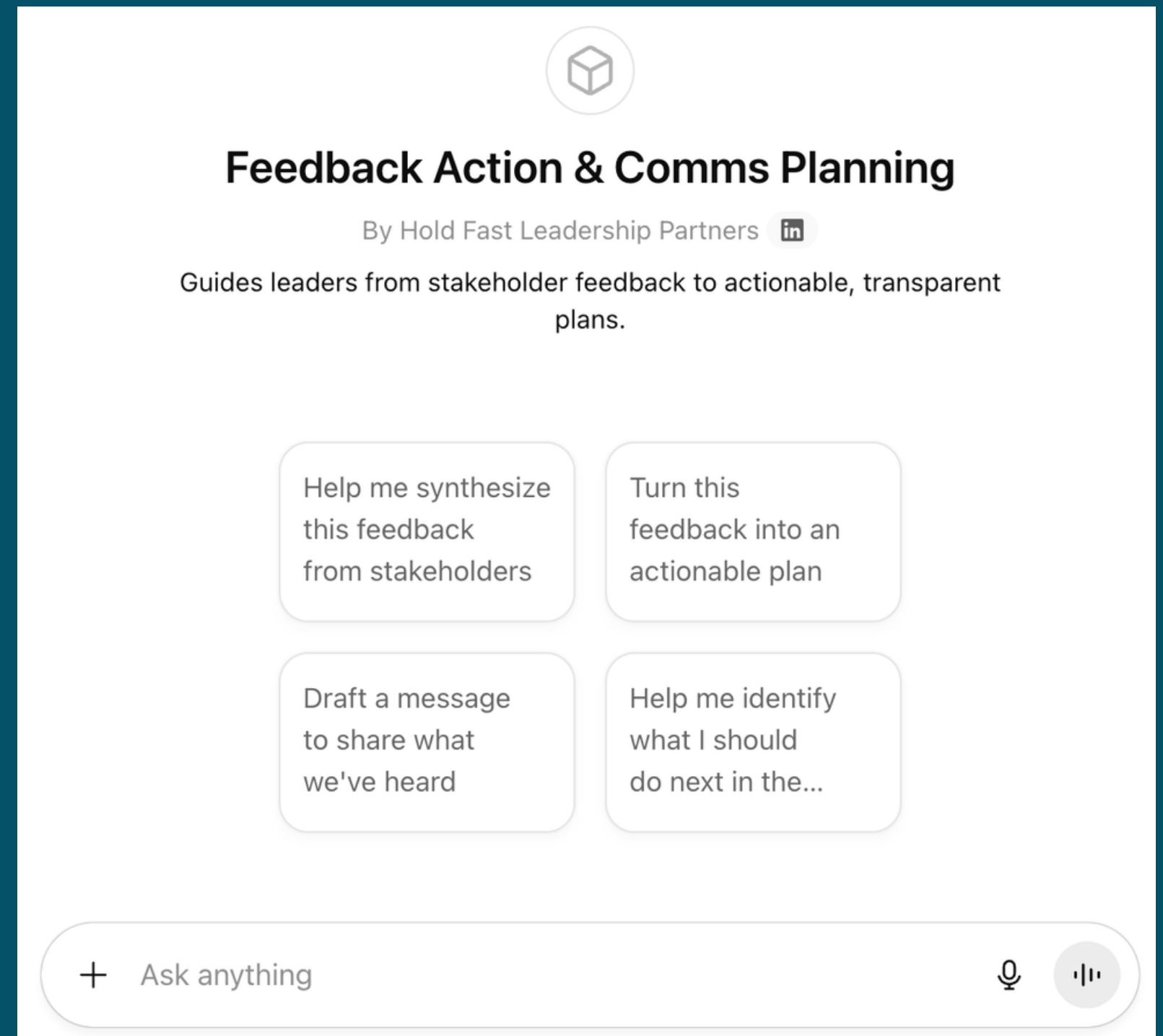
Create tailored retreat agendas to support _x0000_ facilitating reflection and goal-setting conversations

Synthesizing team survey data into _x0000_ actionable insights to ensure your retreat results in clarity, alignment, and strategic focus for the year ahead

Data-Driven Leadership

The Feedback CustomGPT can:

- Import survey results (copy/paste, text, or upload of data, docs, etc.)
- Identify trends & themes
- Help you prioritize critical moves
- Draft an action plan for leaders
- Produce audience-specific comms plans
- Generate timelines & messaging
- Produce deliverables to adjust course



The screenshot shows the interface for a CustomGPT tool titled "Feedback Action & Comms Planning". At the top, there is a logo of a cube inside a circle. Below the title, it says "By Hold Fast Leadership Partners" with a LinkedIn icon. A subtitle reads "Guides leaders from stakeholder feedback to actionable, transparent plans." The main area contains four rounded rectangular buttons with the following text: "Help me synthesize this feedback from stakeholders", "Turn this feedback into an actionable plan", "Draft a message to share what we've heard", and "Help me identify what I should do next in the...". At the bottom, there is a search bar with a plus sign, the text "Ask anything", a microphone icon, and a volume icon.

Continuous Improvement: Staff Development



Setting Up a Performance Management Project in ChatGPT

How to use Projects within ChatGPT to capture concrete evidence throughout the year, strengthen your skill as a coach, and save hours on performance reviews.

Why Use AI for Staff Support & Development

Great performance management requires consistency, context, concrete examples, and institutional memory. It's easy for valuable feedback to slip through the cracks in the rush of the school year. Projects in ChatGPT allow you to:

- Keep all staff materials and notes in one organized place
- Build institutional memory across the year
- Capture quick feedback without losing it
- Upload templates so AI drafts in your voice and format
- Turn months of artifacts into ready-made performance reviews, PD plans, coaching summaries, and tough-conversation prep

This system isn't intended to replace your judgment. But it should free up your time to be a stronger, more prepared leader when it's time to support and develop your teammates.

The Goal

This AI hack lets you spend less time compiling and writing, and more time:

- coaching face-to-face
- giving real-time feedback
- having the harder (human) conversations
- developing your people
- leading with clarity and presence

This is a productivity system that strengthens your leadership, not replaces it.

Why Use AI for Staff Support & Development

Great performance management requires consistency, context, concrete examples, and institutional memory.

Projects or Gems allow you to:

Keep all staff materials and notes in one organized place

Build institutional memory across the year

Capture quick feedback without losing it

Upload templates so AI drafts in your voice and format

Turn months of artifacts into ready-made performance reviews, PD plans, coaching summaries, and tough-conversation prep

Continuous Improvement: Priority & Goal Setting

Using Gemini Gems to Roll Out Priorities & Build Alignment within Teams

- Shared planning templates
- Consistent goal-setting logic
- Team-level alignment
- Think of Gems as...
- ChatGPT Projects + Shareable Custom GPTs
- Could replace guided worksheets, templates, and extensive training on process

The screenshot shows the configuration page for a Gemini Gem titled "2026-27 Priority & Goal Setting". The interface includes several sections for defining the gem's behavior:

- Description:** A text input field with the placeholder "Describe your Gem and explain what it does".
- Instructions:** A text input field with an information icon. The placeholder text reads: "Example: You are a horticulturist with a background in natural lawns and native plants, and you help people plan". Below the text are icons for undo, redo, and edit.
- Default tool:** A dropdown menu currently set to "No default tool".
- Knowledge:** A section with an information icon and a text input field containing "Add files for your Gem to reference" and a plus sign icon for adding files.

Application: Automating a Workflow

Criteria for Automation

Identify automation opportunities

Avoid over-automation

Make strategic efficiency decisions



Criteria for Automation

The following may make a process or task more suitable for automation.

| | |
|--|--|
| | Documented and effective. Processes that are written out and getting the intended outcomes are good candidates for automation. Automation won't fix a broken process! |
| | Repetitive. Processes that are repetitive and occur frequently are good candidates for automation, such as data entry, scheduling, and report generation that require little variation. |
| | High volume. Tasks that involve handling large volumes of data or transactions are good candidates for automation. Automating these tasks can reduce the likelihood of errors and improve consistency. |
| | Time-consuming. Processes that are time-consuming and resource-intensive can be good candidates for automation. |
| | Rule-based. Processes that involve rule-based decision-making and follow predictable patterns can be automated. Automated systems can apply predefined rules consistently and efficiently without human intervention. |

The following may make a process or task less suitable for automation.

| | |
|--|---|
| | Complex decision-making. Processes that require complex decision-making or judgment based on nuanced factors may not be suitable for automation. |
| | Highly variable. Tasks that involve a high degree of variability or unpredictability may not be well-suited for automation. |
| | Sensitive or confidential information. Processes that involve handling sensitive or confidential information may not be appropriate for automation due to security concerns. Automated systems may increase the risk of data breaches or unauthorized access if not properly secured. |
| | Customer-facing interactions. Processes that involve direct interactions with students, staff, families, and community members that require personalized or empathetic communication may not be appropriate for automation. Also consider whether the process is an important opportunity to build rapport or understand individual circumstances; these may make something a poor fit for automation. |
| | Creative or innovative. Tasks that require creativity, innovation, or out-of-the-box thinking are less likely to be effectively automated. |



Automation Planning Tool

Create clarity and alignment

Increase accountability and consistency


Identify gaps, variations, and improvement opportunities



Automation Planning Tool

| | |
|---|--|
| Purpose: What specific problem or challenge is this system intended to address? | |
| Users: Who will the primary users of the system be, and what are their needs? | |
| Timeframe: Are there deadlines that affect the development and/or implementation of this system? For what time horizon are you developing the system (e.g. something that will work for the next 12 months, or something that will work for the next 4 years)? | |
| Scale: Based on your timeframe, what future growth or other organizational plans does your system need to be able to accommodate? | |
| Integration: Does the new system need to integrate with existing systems and processes? If this is a long-term solution, what future integrations might be necessary? | |
| Budget: What is the budget available for this system? Will creating this system result in cost savings? Might you leverage those future cost savings to cover any upfront investment costs? | |
| Flexibility: Is this the type of system where you can provide a lot of flexibility to users (loose), or one where you need people to do things in a very specific way (tight)? | |
| Engagement: Who else needs to approve your design? Who needs to be engaged in the design process? Who needs to be informed of your final design? | |
| Oversight: What aspects of the system design require leadership oversight, and what can be delegated? | |

Apply It!



Choose one organizational challenge you want to improve this year with AI and automation

x0000

Use the Automation Planning Tool to begin to _{_x0000_}
plan your next steps

Automation Planning Tool

| | |
|---|--|
| Purpose: What specific problem or challenge is this system intended to address? | |
| Users: Who will the primary users of the system be, and what are their needs? | |
| Timeframe: Are there deadlines that affect the development and/or implementation of this system? For what time horizon are you developing the system (e.g. something that will work for the next 12 months, or something that will work for the next 4 years)? | |
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| Integration: Does the new system need to integrate with existing systems and processes? If this is a long-term solution, what future integrations might be necessary? | |

Discussion & Reflection

Small Groups: _x0000_

How are you already leveraging AI for strategic planning and data-driven leadership? _x0000_

Where is an opportunity for you to leverage AI for strategic planning and data-driven leadership? _x0000_

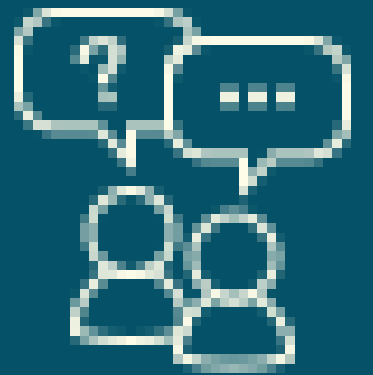
What are your next steps? _x0000_

Whole Group: _x0000_

Where is an opportunity for you to leverage AI for strategic planning and data-driven leadership? _x0000_

Reflection: _x0000_

Jot down your next steps _x0000_



2

minutes



2

minutes



1


minute



Thank
you



seminar.community hello@seminar.community

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**“
Your
feedback
helps us all
move forward
together**



**Colorado League of
Charter Schools**

Each time you take the survey you can enter to win prizes