



2026 - 2029 STRATEGIC PLAN

March 2026

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Letter from the Executive Director

Dear Partners, Advocates, and Friends,

New York State's education system stands at a profound and tenuous moment. We have built hard-fought momentum through statewide literacy reform and a renewed focus on evidence-based instruction, yet deeply entrenched structural inequities persist.

We now face a critical data void, an impending state budget deficit, and systemic barriers that disproportionately impact Black, Latinx, Native American, and Asian American and Pacific Islander students, as well as those from low-income backgrounds.

To meet this moment, EdTrust-New York must evolve. We can no longer simply advocate for policy change; we must act as the state's most agile catalyst for educational equity.

Over the next few years, we will position EdTrust-New York as a critical bridge in the state's education ecosystem. The 2026–2029 Strategic Plan outlined in these pages serves as our blueprint for that evolution. Through it, we commit to ensuring student success from early care through entry into the workforce.



To achieve this, we are sharpening our strategy to drive deeper, more sustainable statewide impact. We are building our capacity to respond rapidly to real-time inequities during fast-moving legislative and political cycles. We are formalizing a structured model for community-led policy so that the lived experiences of parents, students, educators, and practitioners directly inform our agenda. We are also investing in relationships with agency leaders, decision-makers, elected officials, and partners across New York to ensure our work reflects the needs of the entire state.

We envision a future where the system, not individual students and families, bears responsibility for student outcomes. In this vision, the education system is accountable and empowers underserved communities to thrive.

I invite you to review this plan and partner with us in this work. Together, we can translate on-the-ground realities into actionable, evidence-based policy and build an education system that guarantees success for every child in New York.

Thank you to our EdTrust-New York team and partners for your contributions and leadership, and Angeles Impact Advising (AIA) for guiding and executing this process to develop this ambitious and visionary plan.

In solidarity,

Arlen Benjamin Gomez

Introduction: About EdTrust-New York

Our Mission

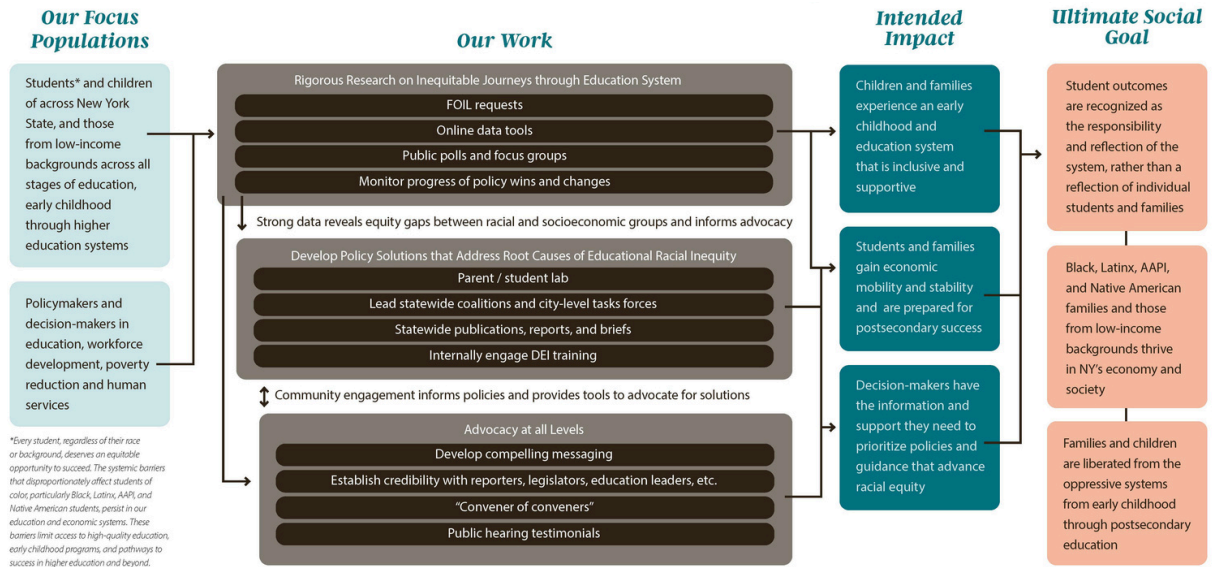
Through data analysis, research, and advocacy, we build awareness of education and racial equity gaps and drive policies that ensure all students in New York— particularly Black, Latinx, Native American, Asian American and Pacific Islander, and those from low-income backgrounds — receive a high-quality, culturally sustaining education.

Our Vision

We envision a future where student outcomes are recognized as the responsibility and reflection of the system, rather than a reflection of individual students and families. A future where oppressive structures are transformed to ensure students flourish from early childhood through postsecondary education in New York State. In this future, Black, Latinx, Native American, Asian American and Pacific Islander students and families, as well as those from low-income backgrounds, thrive in New York's economy and society.

Our Theory of Change

Our Theory of Change, developed in 2024, illustrates how we move from rigorous research to targeted advocacy, ultimately driving systemic accountability and student success.



We draw on our research expertise to inform and support the development of policy solutions, build awareness, and cultivate advocacy efforts that prioritize racial equity in education. Our data-driven approach is rooted in advocacy at all levels — at the local, city, and state levels — to hold policymakers and state leaders accountable for student outcomes.

Yet we know the solutions that will move New York forward are strongest when they are collectively developed and center those who are impacted by policies the most. That’s why we convene statewide coalitions and campaigns to collaborate with equity-driven parents, students, civil rights, education, and business organizations. This approach allows us to maximize our impact and co-create policy solutions that are anchored in lived experiences.

Our Value Proposition

Our charge for the next few years is to position EdTrust-New York to serve as a critical bridge in the state's education ecosystem. We leverage data and policy expertise alongside coalition-convening power to translate on-the-ground realities into actionable, evidence-based policy.

Through EdTrust-New York's research and advocacy, the education system in New York is held accountable and is transformed to ensure that underserved families thrive.

EdTrust-New York is New York's most agile catalyst for educational equity, providing the data-driven insights and specific legislative solutions to:

- dismantle systemic barriers
- transform student outcomes
- guarantee systemic responsibility
- ensure every student achieves economic mobility from childcare to the workforce



Strategic Planning: Why Now

In 2024-25, EdTrust-New York participated in Bridgespan's Achieving Strategic Clarity Program to develop the organization's first Theory of Change. This collaborative, team-driven process helped define the organization's population of focus, intended impact, and ultimate social goal. This strategic plan serves as the bridge between our overarching theory and our execution.

New York's education landscape faces a profound and tenuous moment. To meet this moment effectively, we knew the importance of responding to several pressing realities:

- **Aligning Staffing and Capacity:** To successfully execute our Theory of Change, we needed to review our internal structures so that our staffing and organizational capacity are fully aligned and resourced to meet our evolving advocacy goals.
- **Impending Fiscal Challenges:** The state's impending budget deficit is a primary concern for all state-level partners. Without a focused and agile advocacy strategy, there is a risk of austerity measures that would disproportionately impact the students we serve.
- **Need for Focus:** EdTrust-New York's work has covered a broad span of issues, spanning from early childhood to post-secondary success, often leaving the organization stretched for impact among a small team operating across these areas.

This strategic plan serves as our guide, anchored in three central pillars, to meet this moment and to prepare organizationally, culturally, and financially. It grounds our work in agility, systemic equity, and a deepened commitment to success.

Process for Plan Development

Rooted in data, partner insights, and staff engagement, our process for developing this plan involved the following methodology:

- **Stakeholder Information Gathering:** Between September and December 2025, we conducted more than 18 individual, 45-minute interviews with a diverse array of leaders across New York. These included representatives from the Governor's office, the New York State Education Department (NYSED), NYC Public Schools, key legislative staff, as well as leaders from philanthropy and regional community organizations.
- **Coalition Engagement:** We gathered insights from members of our core collectives, conducting surveys and interviews with the New York Equity Coalition and the Raising New York Coalition to understand their perspectives on EdTrust-New York's unique value and areas for growth.
- **SWOT Analysis & Synthesis:** We utilized a SWOT (Strengths, Weaknesses, Opportunities, and Threats) framework to synthesize these diverse perspectives. This process allowed us to clearly define our unique value proposition: our deep policy expertise, our credible relationships with decision-makers, and our opportunity to bridge the gap between community voice, school district and state-level policy.
- **Iterative Design:** The plan was designed and refined through various internal discussions and staff engagement sessions so that the final framework provides opportunities to address emerging needs and sharpen the organization's overall strategic focus.

This collaborative effort has resulted in a plan that moves us toward our vision and indicates our shared commitment to New York's students and families.

Strategic Pillars and Actions: Executing Our Vision

EdTrust-New York has established three strategic pillars to be both a long-term champion for equity and an agile responder to emerging challenges. We will utilize a targeted set of advocacy levers to further organizational priorities across these pillars, including data tool releases, issue polling, stakeholder convening, and legislative and budget advocacy. Over the next three years, we will advance the following critical actions to execute on our vision:

Pillar 1 | Rapid Response: Mobilize for Emerging Needs

Pillar 2 | System Gaps: Address Persistent Structural Inequities

Pillar 3 | Beyond the Bill: Translate Wins Into Tangible Change

Pillar 1 | Rapid Response: Mobilize for Emerging Needs

Ensure organizational agility to identify and act on real-time inequities that arise in fast-moving political, legislative, and budget cycles.

EdTrust-New York will strengthen its capacity to access and analyze data efficiently as critical issues emerge. Through expanding this capacity, EdTrust-New York will collect, analyze, and share key information to inform and educate stakeholders about unforeseen issues impacting students and families. The organization will do this by taking the following actions:

- **Expand Rapid Research & Analysis Capacity:** Enhance team capacity to rapidly support data collection, analysis, and emerging research.
- **Invest in Government Relations & Advocacy:** Engage with decision-makers early and often to shape strategy and stay ahead of emerging needs, gaps, and barriers. Strengthen partnerships with government relations and political strategy experts to deliver tiered, data-backed policy options that drive action--even in constrained budget environments.
- **Enhance Presence in Albany:** Invest in a more consistent presence in the state capital to deepen relationships and remain connected with policymakers during critical legislative and implementation phases.
- **Leverage National Resources:** Utilize the broader expertise and resources at EdTrust National to support statewide rapid response efforts.

EdTrust-New York aims to quickly collect and analyze data and publish reports that inform government agencies and elected officials in decision-making around emerging needs. This includes, and is not limited to (1) real-time data analysis to influence fast-moving state, and federal legislative issues, ensuring decision-makers have the evidence needed to protect and support students, and (2) shaping local city education agendas by proactively engaging with the local leadership, so that equity remains at the center of school district's shifting educational priorities and governance discussions.

Why this is critical: There is an increased need for educational partners that can respond to shifting legislative and political cycles. Across stakeholder conversations, EdTrust-New York's ability to efficiently share data and reports on emerging issues was highlighted. For example, in early 2025 EdTrust-New York analyzed and shared Foundation Aid formula revisions with foundation and government partners, which was highlighted as highly valuable.

Pillar 2 | System Gaps: Address Persistent Structural Inequities

Tackle the structural inequities that prevent underserved students from thriving. Students, parents, educators, and direct service partner insights will drive these priorities.

EdTrust-New York will identify persistent structural inequities and develop processes to strengthen opportunities for stakeholders with lived experience - students, parents, educators, and direct service partners - to inform the organization's priorities in this area. This will support clear decision-making aligned with organizational values. The organization will do this by taking the following actions:

- **Formalize and Expand Community-Led Policy Opportunities:** Create systems for how the lived experiences of parents, students, educators, and practitioners inform the organization's policy agenda. Consider the impact and expansion of Student and Parent Labs and secure broader geographic representation of the cohorts. Leverage targeted resources to build the capacity of regional and grassroots partners, particularly in Upstate New York, ensuring they have the infrastructure to mobilize locally and co-create statewide policy priorities.

- **Fill Critical State Research Gaps:** Conduct agile, in-depth analysis in under-explored areas to inform policy and advocacy. Produce annual research on complex issues that surfaces hidden inequities and drives legislative action.
- **Sharpen Strategic Focus:** Align and narrow the organization's policy agendas in this pillar to three critical issues to maximize resources and deepen constituency alignment.

Areas within this pillar may include, but are not limited to, support for multilingual learners, championing a state longitudinal data system, and defending robust statewide assessment, rigorous graduation measures, and accountability systems.

Why this is critical: In the face of deeply entrenched systemic barriers, there is an urgent need for sustained, focused advocacy that bridges the gap between high-level policy and on-the-ground realities. Across stakeholder conversations, partners consistently emphasized that the organization must prioritize a targeted set of winnable issues rather than stretching its capacity across a broad agenda to maximize its impact. The organization's ability to authentically integrate community voices was also highlighted as a rare and vital asset in the advocacy ecosystem. For example, stakeholders cited the Parent Lab as a crucial vehicle for bringing parent perspectives to the policy table. Legislative staff specifically noted the immense value of EdTrust-New York in translating community insights into concrete, data-backed legislative proposals and bill language.

Pillar 3 | Beyond the Bill: Translate Wins Into Tangible Change

Double down on progress made to ensure that legislative wins translate into tangible changes in schools and classrooms. Leverage our convening and coalition power so that wins lead to impact across the state.

EdTrust-New York will build the operational infrastructure and statewide relationships necessary to move from policy passage to effective program execution. Specifically, the organization will do this by taking the following actions:

- **Deepen Relationships with Decisionmakers:** Engage regularly with NYSED officials, policy makers, elected official staff members, school district leadership, and influencers to monitor and understand needs around policy implementation.
- **Invest in Geographic Alignment:** Deepen relationships in Western and Central New York, specifically Buffalo, Rochester, and Syracuse, and bring together regional advocacy and education organizations to support implementation success across the state.

- **Revitalize the New York Equity Coalition:** Strengthen the coalition's operations and impact with the evolution of a dedicated partnerships and engagement function to drive effective coalition practices.
- **Advance Research and Data Tools:** Continuously update and deploy interactive data tools and research components to track the impact of state policies, equipping partners with the data they need for system accountability.

Areas within this pillar may include, but are not limited to, continued investment in high-quality access to childcare, literacy and numeracy foundational skills, higher education financial aid, and expanding access to pathways for higher education.

Why this is critical: Stakeholders clearly indicated that passing legislation is only the first step; there is a significant, unmet need for monitoring policy implementation, budget allocation, and program effectiveness at the state and district levels. Additionally, as a statewide organization, partners emphasized the importance of investing deeply in upstate relationships and understanding local funding constraints to avoid a NYC-centric perception. Finally, coalition members voiced a desire for revitalization of the New York Equity Coalition, identifying opportunities for engagement that build on the coalition's peak effectiveness.

Conclusion: Moving Forward Together

The challenges facing New York's education system are deeply rooted, but they are not insurmountable. Today, glaring disparities persist across the state. This is not a reflection of student ability or potential, but rather a clear reflection of a system that has not adequately addressed the needs of our communities.

The 2026–2029 Strategic Plan is EdTrust-New York's commitment to changing this reality. We will ground our work in three strategic pillars - mobilizing for emerging needs, addressing persistent structural gaps, and ensuring legislative wins translate into tangible impact. By doing so we are moving beyond the status quo to build an advocacy infrastructure that is agile, deeply connected to community voices, and authentically representative of the entire state--from New York City to Syracuse, Rochester, and Buffalo. Over the next three years, our impact will be reflected through the following milestones:

- **Policy, Investment and Implementation Shifts:** Securing targeted, equity-centered investments in critical areas, effectively defending against austerity measures that threaten underserved students, and tracking whether legislative and budgetary wins are translating into equitable, district-level resource allocations and program fidelity.
- **Statewide Community Power:** The successful expansion of our Parent and Student Labs and the revitalization of the New York Equity Coalition, reflecting broader representation, and demonstrating that our policy agenda is driven by a representative, statewide constituency.
- **Geographic Equity:** Deep relationships across Western and Central New York in addition to New York City, and alongside a strengthened footprint in Albany, ensuring we are positioned to drive impact statewide.

Achieving this bold vision, however, is not a solitary endeavor. A systemic transformation requires the collective power, expertise, and sustained commitment of policymakers, direct service providers, educators, funders, and, most importantly, the students and families who navigate these systems daily.

We invite our partners, advocates, and friends to join us in this vital work. Collectively, we can dismantle structural barriers and build an accountable education system, guaranteeing that every Black, Latinx, Native American, Asian American and Pacific Islander student, and every student from a low-income background, can achieve economic mobility and lifelong success in New York State.

Call to Action: How We Win Together

- **For Policymakers:** Leverage our data briefs and deep policy expertise to inform your legislative priorities and ensure equitable district funding.
- **For Advocates & Community Leaders:** Join our coalition work to co-create community-led policy and ensure our statewide agenda reflects on-the-ground realities.
- **For Funders & Philanthropic Partners:** Trust our leadership and vision by providing general operating support, which fuels our agility to rapidly respond to emerging needs. Invest in our capacity to translate wins into tangible change by directly supporting our student and parent labs, data analysis infrastructure, and expanded geographic footprint.
- **For Students & Families:** Share your lived experiences by joining our Parent and Student Labs to shape our statewide policy agenda. Participate in our issue polling so that your opinions and voices are heard.

Acknowledgments

Thank you to all partners, interview participants, survey respondents and Education Trust-New York team who thoughtfully contributed their insights throughout the planning process. We look forward to working together with our team, board, supporters and partners to execute our ambitious plan outlined here, and sharing updates on our progress along the way.

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