



**URBAN CHARTER SCHOOLS COLLECTIVE  
(UCSC)**

BOARD MEETING AGENDA

**MAY 29, 2018**

**SPECIAL BOARD MEETING AGENDA**

This meeting is being video recorded.

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**BOARD MEMBERS**

Miles E. Myles, President (Term Expires June 2019)

Yong Lor, Board Secretary (Term Expires June 2019)

Dennis M. Mah, Board Treasurer (Term Expires June 2018)

Guy Ollison, Board Member (Term Expires June 2018)

Vacant, Vice President (Term Expires June 2018)

Vacant, Board Member (Term Expires June 2017)

Vacant, SCUSD Representative (No expiration)

5:00 PM Convene

6:00 PM Adjourn

**LISBON ELEMENTARY LIBRARY, ROOM 3**

7555 S. Land Park Drive, Sacramento, CA 95831

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\* Supporting materials will be distributed at the meeting.

- 1. CALL TO ORDER 5:00 PM**
- 2. BOARD ROLL CALL 5:01 PM**
- 3. ADJUST AND APPROVE AGENDA AS NEEDED 5:03 PM**
- 4. PUBLIC COMMENT – Limit Two Minutes Per Person and Ten Minutes Per Issue Listed in the Agenda 5:05 PM**
- 5. ACTION ITEM – Selection and Approval of a Strategic Planning Consultant 5:15 PM**
- 6. ACTION ITEM – Approval of 2018-19 Employee Handbook with emphasis on 3PM – 5PM Collaboration Time for Teachers 5:35 PM\***
- 7. ACTION ITEM – YPSA Support Plan – HET Implementation Plan 5:45 PM**
- 8. ADJOURN 6:00 PM**

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**NOTE:** If you need a disability-related modification or accommodation, including auxiliary aids or services, to participate in the public meeting, please contact Lee Yang (916) 752-8791 at least 48 hours before the scheduled Board meeting so we may make every reasonable effort to accommodate you. [Government Code § 54954.2; Americans with Disabilities Act of 1990, § 202 (42 U.S.C. §12132)]

Regularly Scheduled UCSC Board meetings are held on the second Monday of each month, except as noted.

- All meetings start at 6:00 PM and are conducted in the Lisbon Elementary staff lounge.

- Regular board meetings for 2017 – 2018 have been scheduled for Aug. 14, Sept. 11, Oct. 9, Nov. 13, Dec. 11, Jan. 8, 2015, Feb. 5, Mar. 12, Apr 9, May 14, June 11, June 25 (4<sup>th</sup> Monday)

## CALENDAR OF REGULAR BOARD MEETINGS

**APPROVED AND ADOPTED ON APRIL 17, 2017**

Regularly Scheduled UCSC Board meetings are held on the second Monday of each month, except as noted below for November and June. All meetings start at 6:00 PM and are conducted in the Lisbon Staff Lounge located at 7555 South Land Park Drive in Sacramento, CA 95831.

Each regular meeting will have the following two agenda items:

- 1) Principal's Report on Instruction & Learning which includes: ELAC update, Academy Council update, enrollment & attendance update, and suspension & referral update.
- 2) Chief Financial Officer's summary of Finance & Operation which includes: profit & loss statement for through the end of the prior month and cash flow update,

AUGUST 14, 2017	SEPTEMBER 11, 2017	OCTOBER 9, 2017	NOVEMBER 13, 2017
<ul style="list-style-type: none"> <li>Review actual enrollment and attendance and compare to projected</li> <li>Review work of board nominating committee</li> <li>Preparing for annual board self-evaluation</li> <li>Appoint nominating committee for vacant board position(s)</li> <li>Update Board priorities</li> <li>Approval on Middle School Name and Review of Petition</li> <li>Approval on 2017-2018 Employee Handbook</li> </ul>	<ul style="list-style-type: none"> <li>Annual Board organizational meeting</li> <li>Annual Board self-evaluation</li> <li>Review annual program audit before submission to SCUSD by the principal</li> <li>Approve prior year unaudited actuals – due to SCOE 9/15</li> <li>Set goals for next 12 months</li> <li>Discuss Academy Council and Board relationship; See governance section of charter</li> <li>Update Board priorities</li> <li>Discussion on Staff Retention Compensation Committee Meetings</li> </ul>	<ul style="list-style-type: none"> <li>Update Board priorities</li> <li>Staff evaluation process</li> </ul>	<ul style="list-style-type: none"> <li>Update Board priorities</li> <li>Receive &amp; review prior year fiscal audit conducted by Gilbert Associates –due to district, county, CDE, and state controller by 12/15</li> </ul>
DECEMBER 11, 2017	JANUARY 8, 2018	FEBRUARY 5, 2018	MARCH 12, 2018
<ul style="list-style-type: none"> <li>Approve 1<sup>st</sup> Interim Financial Report for July 1-Oct. 31<sup>st</sup> due to SCUSD and SCOE by Dec. 15</li> <li>Introduce mid-year budget revisions to 2017-18 budget for approval at January meeting</li> <li>Update Board priorities</li> </ul>	<ul style="list-style-type: none"> <li>Reviewing the Hmong Language Development Program</li> <li>Review P-1 Attendance report submitted to CDE to compare project &amp; actual attendance. P-1 ended on Dec. 31</li> <li>Approve mid-year budget revisions to 2017-18 budget</li> <li>Review random drawing (lottery procedure) when applicants outnumber available seats</li> <li>Plan for board member and academy council training</li> <li>Update Board priorities</li> </ul>	<ul style="list-style-type: none"> <li>Approve Budget Development Calendar for creating next year's budget</li> <li>Review enrollment and staffing projections in preparation for next year's staffing.</li> <li>Review preliminary budget for next fiscal year based on governor's proposal</li> <li>Approve ConApp Part 2. Due to CDE on Feb 24</li> <li>Discuss staff release procedures</li> <li>Update Board priorities</li> </ul>	<ul style="list-style-type: none"> <li>Approve 2<sup>nd</sup> Interim Financial Report for July 1 - Jan. 31<sup>st</sup> and due to SCUSD and SCOE by Mar. 15</li> <li>Review parent involvement policy</li> <li>Approve instructional calendar for the next school year</li> <li>Review admin, teacher, and other staff compensation</li> <li>Update Board priorities</li> <li>Review 2018-2019 UCSC Board Meeting Calendar</li> </ul>
APRIL 9, 2018	MAY 14, 2018	JUNE 11, 2018	JUNE 25, 2018
<ul style="list-style-type: none"> <li>Board reviews and gives feedback to Academy Council on their budget recommendations for next year</li> <li>Approve 2<sup>nd</sup> budget revisions to 2017-18 budget</li> <li>Update one-year study and application process to join new SELPA</li> <li>Salary schedule for 2018-19</li> <li>Update Board priorities</li> <li>Approval of 2018-2019 UCSC Board Meeting Calendar</li> <li>Review and Conference on proposed 18-19 budget draft 4 and LCAP from Academy Council</li> </ul>	<ul style="list-style-type: none"> <li>If released, review governor's May revisions to next year's proposed budget. Might not be released until the 15<sup>th</sup></li> <li>Review P-2 Attendance report submitted to CDE to compare project and actual attendance. P-1 ended on April 15<sup>th</sup></li> <li>Approve new hires</li> <li>Approve list of employees with reasonable assurance of returning next year</li> <li>Update Board priorities</li> </ul>	<ul style="list-style-type: none"> <li>Public hearing on the updated-LCAP and 2018-19 budget.</li> <li>Update Board priorities</li> </ul>	<ul style="list-style-type: none"> <li>Approve next year's budget and submit to SCUSD and SCOE by July 1<sup>st</sup></li> <li>Annual review and affirmation of Title I Parent Involvement Policy</li> <li>ConApp Part 1 due June 30 for Title I, II, &amp; III funding</li> <li>Review all staff evaluations</li> <li>Approve new hires</li> <li>Approve updated-LCAP and 2018-19 Budget</li> <li>Update Board priorities</li> </ul>

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# **CONSULTANT GROUP #1:**

**THE WEISS GROUP**



## OUR APPROACH

The Weiss Group's methodical preparation and engaging facilitation skills ensure that critical strategic planning discussions are focused, productive and build the foundation for successful follow through. Your key constituents walk away feeling aligned, confident and committed to moving forward.

Our insightful, objective counsel helps you establish priorities, embrace a shared vision and develop results-driven strategies for making your vision possible.

The process we follow will provide you with a customized Strategic Plan that

- Addresses the key opportunities and challenges facing your organization
- Incorporates the best thinking from your leadership team and key constituents
- Establishes a clear roadmap for the organization's future.
- Encourages engagement, transparency and accountability throughout the process

When our engagement is complete, you'll have a Strategic Plan that has the shared ownership of your stakeholders and is *actionable*.

## OUR SERVICES

The Weiss Group's strategic planning services include:

- Organizational Assessment and Environmental Scan
- Focus Groups and Surveys
- Establishment of Performance Metrics
- Strategic Plan Development
- Meeting and Retreat Facilitation
- Executive Coaching
- Business Plan Execution

## ABOUT THE WEISS GROUP

For over a decade The Weiss Group has provided the strategic counsel and support to help clients address challenges, maximize opportunities and achieve their vision.

The Weiss Group has a demonstrated track record of success among a diverse array of clients, including the Public Policy Institute of California, UC Davis Health, Sacramento State University, Los Rios Community College District, Academic Senate for California Community Colleges, Sacramento Region Community Foundation, CalAsian Chamber of Commerce, Kaiser School of Allied Health Sciences, Western Health Advantage, The Sacramento Bee, and California Forward.

We bring the right talent to each assignment, assembling project teams with the experience and expertise to ensure a positive outcome. This collaborative approach provides powerful, actionable solutions that connect your organization with its members and effectively build toward a successful future.

2000 L Street Suite 250, Sacramento, CA 95811 • 916-443-2021 • [steve@weissgrp.com](mailto:steve@weissgrp.com) • [www.weissgrp.com](http://www.weissgrp.com)

**Steven Weiss, MBA, will be responsible for leading this client engagement.**

Steven Weiss is a seasoned business strategist with more than 25 years of experience at some of Northern California's most prominent public, private and nonprofit organizations.

Prior to establishing his own consulting practice in 2007, Weiss was vice president of Marketing & Public Affairs for The Sacramento Bee, the McClatchy Corporation's flagship publication. At The Bee, he led the organization's branding, marketing and public affairs initiatives at a time of unprecedented growth and profitability. Weiss overhauled and directed The Bee's charitable giving program, including the granting of more than \$8 million in cash and in-kind support to local nonprofit organizations during his tenure.

Weiss was director of University Cultural Programs at UC Davis where he chaired the building committee and served on the leadership team responsible for generating philanthropic support for the \$60 million Mondavi Center for the Performing Arts. He is also responsible for creating the campus' highly successful Distinguished Speaker Series.

Weiss is an accomplished presenter, trainer and lecturer, having delivered numerous workshops and programs at conferences, industry gatherings and for various nonprofit organizations. In addition, he held a lecture appointment at UC Davis, teaching management theory and practice.

Weiss began his career in the political arena, serving as deputy campaign manager during a successful California State Senate campaign.

Dedicated to community service and professional involvement, Weiss currently serves as a Capital Public Radio board member and is the past board vice chair. He is the former board chair for KVIE, Sacramento's Public Broadcasting Station and is a former member of the Sutter Davis Hospital Foundation Board. Weiss is a senior fellow and former board member of the American Leadership Forum's Mountain Valley Chapter and serves on the Advisory Board for California State University, Sacramento's College of Business Administration. In 2013, Weiss was certified as a governance trainer from BoardSource, the national organization committed to strengthening nonprofit board leadership.

Weiss has been named Volunteer of the Year by the Sacramento Metro Chamber and was given the Arts Leadership Award by the Sacramento Arts and Business Council.

# **CONSULTANT GROUP #2:**

**NATIONAL CENTER FOR EXECUTIVE & SCHOOL BOARD  
DEVELOPMENT**



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209-765-4818  
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March 8, 2018

Urban Charter Schools Collective  
Mr. Lee Yang, Superintendent  
7555 S Land Park Dr  
(916) 433-5057

Dear Yang,

We want to begin by expressing our appreciation for your consideration of the Strategic Plan Proposal reflected below. The proposal focuses on the philosophical and practical aspects of the strategic planning process facilitated by the National Center for Executive Leadership & School Board Development (National Center).

The Strategic Plan process facilitated by the National Center produces a **political, accountability, compliance, and inspirational document** that serves three main purposes. First, the plan engages stakeholders and provides the Board's **political** direction in addressing the Charter's vision, mission, ranked objectives, expected annual measurable outcomes and metrics. Second, the Strategic Plan provides the source document used for drilling down to create three to four goals, which provides for **compliance** in the development of the Local Control Accountability Plan (LCAP). Lastly, the Strategic Plan, with action taken by the Board in the ranking of the objectives, provides clarity and **inspiration** to the Superintendent and staff in addressing the priorities of the Board and community.

The strategic planning process facilitated by the National Center is a model of strategic planning that creates a document that drives the vision of the Board, staff, and community into the practices of the Charter. At the core of the uniqueness of our model is the ranking of the objectives by the Board and the creation of expected annual measurable outcomes used to assess the continuous improvement of the Charter, while addressing the requirements of LCFF and LCAP. It is the belief of the National Center that Charters and Districts have enough funding to do **anything they want**, not enough funding to do **everything they want** and, as such, the ranking of the objectives by the Board of Directors is **the essential component** of the National Center's unique process.

## **Role of the School Board**

The Board serves as final authority to approve or deny the recommended Vision, Mission, Charter Ranked Objectives, Expected Annual Measurable Outcomes and Metrics developed by the Stakeholders and Staff. The National Center believes that direct community and Board involvement is essential, with the Board holding sole responsibility in the final ranking of the Objectives for the Charter.

The Board must be willing to be actively involved in the development process, deciding what will be measured and who will be held accountable. The Board must also be willing to be actively involved in the annual assessment and evaluation of the Strategic Plan to ensure that the Charter is making the expected gains toward addressing the ranked Objectives. In working with Stakeholders, the Board can ensure that it is serving the best interest of the students, while addressing the needs of the community.

## **Success of Program**

The success of the Strategic Plan process is dependent upon effectively assessing, on an annual basis, the progress made by the Charter. Through a review of the following criteria, student success will be enhanced:

- *student assessments,*
- *state and federal school and Charter assessments,*
- *frequency of activities,*
- *quality of services provided by sites and departments,*
- *quantity of families served,*
- *variety of student engagement strategies implemented,*
- *frequency of site level programs that promote parent engagement in the educational process,*
- *development of positive school cultures,*
- *creation of smaller learning communities and*
- *campuses that are safe and civil for students and visitors,*
- *types of approaches and opportunities for professional development of teaching staff and administrators and,*
- *level of learning taking place in the classrooms.*

## **References**

If you would wish to receive recent referral information, please contact any of the following individuals.

Ms. Sherri Nelson, Executive Director, Connecting Waters Charter School, (209) 274-1119.  
Dr. Karen Villalobos, Superintendent of Twin Rivers Charter School, (530) 218-1909  
Dr. Fred Van Vleck, Superintendent of Eureka City Schools, 707-441-2414  
Dr. Doreen Osumi, Superintendent of Yuba City Unified Charter, 530-822-7600  
Ms. Misty Wharton, Superintendent of Nestucca Charter (Oregon), 503-392-3435  
Mr. Don Davis, Superintendent of Waterford Unified Charter, 209-874-1809  
Ms. Laurie Cardwell, Executive Director of Mountain View Charter Academy, (541) 954-6863  
Mr. Michael Davies-Hughes, Assistant Superintendent of Eureka City Schools, 707-441-2414



If you would wish to speak to individual board members or community members who participated in each Charter, we would suggest you ask the superintendent to provide you the names and phone numbers.

### **Financial Consideration**

The primary core service fee for providing the three-day workshop on the development of the Charter's strategic plan is \$13,500. Additional optional support services are reflected in the appendix to this proposal. Please note that Charters have chosen to fund the Strategic Plan workshop ,and the optional support services that culminates with an Annual Report to the Board, either through general fund and/or categorical funding sources. Federal Title I and LCAP funds can be used to financially support developing community based strategic plans.

In conclusion, thank you for your consideration. Please feel free to contact me at the following number: 209-765-4818, if you are of need of further detail or clarification.

Sincerely,

A handwritten signature in black ink that reads "Walt L. Hanline". The signature is written in a cursive, slightly slanted style.

Walt L. Hanline, Ed.D.  
Executive Director



## **INDEX**

### **MENU of CORE and SUPPORT SERVICES**

#### **APPENDIX:**

Appendix A Pricing Structure

#### **ADDENDA:**

Addendum 1 - Core Service: Development of the Charter's Strategic Plan

Addendum 2 - Modeling the Development of Charter Action Plans

Addendum 3 - Modeling the Development of Site Action Plans aligned to LCAP

Addendum 4 - Development of the Annual Report

Addendum 5 - Strategic Planning Workshop Logistics

Addendum 6 - Consultant Bios

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## APPENDIX A

### PRICING STRUCTURE

The National Center proposes a pricing structure that utilizes a design model to develop the range of services. These services are predicated upon the development of the Charter's Strategic Plan as the "core" service. When viewed as a "project process," meaning partnering with the National Center for the core and auxiliary services, the National Center's Executive Director will have oversight through each phase of the subsequent services beyond the core service and will ensure a customized approach to deliver the product deliverable outcomes in each of the services provided.

It is recommended that the Charter consider each of the menu of services provided by the National Center, in order to ensure the Charter and its stakeholders are involved at each level of the process and there is timely delivery of products to meet LCAP timelines. The comprehensive design model takes into consideration and builds on the Charter's and each school sites' unique team strengths, interests, and needs. While each service builds on the preceding event, each service could be viewed as a *stand-alone*.

*A descriptor of each Service, identifying the specific service, and product deliverables, is detailed in the appendices. Each service is inclusive of travel and expenses and product development.*

#### **Core Service: Development of the Charter's Strategic Plan**

**\$13,500**

Day 1 – Facilitate the Stakeholder Engagement.

Day 2 – Facilitate the development of the recommended Expected Annual Measurable Outcomes and Metrics by the Charter's Strategic Plan Leadership Team.

Day 3 – Facilitate the Board of Directors review of the work of the Stakeholders and , during Day 1 and 2, and the Board's ranking of the Objectives for the Charter. *[The 3-day process will result in a Board approved Strategic Plan for the Charter.]*

#### **Menu of Optional Support Services**

Modeling the Development of **Charter** Action Plans \$ 5,000\*

Modeling the Development of **Site** Action Plans Aligned to LCAP \$ 5,000\*

Development of the Annual Report \$ 5,000\*

\* can be conducted virtually via SKYPE, Go To Meeting, etc. for a fee of \$3,000

*Typically, sites allocate their site funds (General Fund, LCFF, or Title 1) to support Service 4 and share the funding for Service 5. By participating in this process sites demonstrate their understanding of the LCAP.*

1

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## **ADDENDUM 1**

### **CORE SERVICE: Development of the Charter's Strategic Plan by the Board & Community**

The Strategic Plan Workshop takes place over three (3) days and is the “core” of the work in order for the Board and Stakeholders to set the course for the Charter. The process is facilitated by Dr. Walt L. Hanline, Executive Director, with the support of Dr. Mary Hopewell, Associate Director, and Dr. Fred Van Vleck, Consultant.

**During Day 1,** the Stakeholders develop a proposed draft of the Vision, Mission, and provide examples of desired Outcomes and Metrics for the Charter to be considered by the Board. Additionally, the Stakeholders will offer input for the Board to consider, when ranking the objectives that address the Vision and Mission Statements that are developed.

**On Day 2,** the National Center's staff will work with the Charter's Leadership Team (usually composed of between 10 and 20 knowledgeable staff members) in developing the Outcomes and Metrics that respond to the Vision and Mission created by the Stakeholders during Day 1. The Vision and Mission Statements developed by the Stakeholders, and the Outcomes and Metrics recommended by the Leadership Team, will be submitted to Board for approval, which then results in a completed and approved Strategic Plan.

**On Day 3,** the Board reviews and/or revises the work of the Stakeholders and Leadership Team and then ranks the Charter Objectives, taking into the account the input from each Stakeholder participating in the process.

*[Product for Days 1-3: initial **Draft** Strategic Plan, which includes Vision, Mission, Ranked Objectives along with the initial Outcomes and Metrics that address the Vision and Mission of the Charter.]*

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## **ADDENDUM 2**

### **Modeling the Development of Charter Actions and Services**

At the conclusion of the Strategic Planning development process, comes the creation of Charter and Site Action Plans. Each Action Plan flows from the expected Outcomes and Metrics, which drives the action steps performed by the Charter and school site staffs.

Charter and site managers, referred to as the Strategic Plan Executive Team, will be provided a model and process in developing and implementing Action Plans. The result of the work of the National Center's Associate Director, Dr. Mary Hopewell, will be that the Executive Team will have the skills to replicate and complete the process for the remaining Charter required Action Plans. Following the work with Dr. Hopewell, the Executive Team will then complete the development of the Charter Action Plans and "pass" the document and modeling onto school sites and departments for completing the deliverables, which may require sites and departments to develop and implement local action plans.

*[Product: Selected Examples for Charter Action Plans.]*

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## **ADDENDUM 3**

### **Modeling the Development of Site Action Plans Aligned to LCAP**

Modeling the Development of Site Action Plans Aligned to LCAP provides facilitation and support to site leadership and staff to develop their respective Site Action Plans that flow from the Board's approved Strategic Plan Outcomes and Metrics. The National Center's Associate Director, Dr. Hopewell, will provide suggestions to address the unique needs of each school site in order to gain momentum in addressing the Charter's Strategic Plan Outcomes and the Charter's Action Plans expectation.

Once completed, the Site and Department Action Plans will be brought to the Superintendent for approval.

*[Product: Selected Examples for Site Action Plans.]*

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## **ADDENDUM 4**

### **Annual Report**

By completing the National Center's Strategic Planning Development process and comprehensive support services, the Charter will be able to meet the LCAP compliance requirements and mark annual progress toward the efforts derived from the implementation of the previously agreed upon Action Plans that address the Outcomes and Metrics within the Strategic Plan.

The Annual Report provides a year-end summary of results, both for the Charter Ranked Objectives and for the 3 to 4 Focused LCAP Objectives. The summary includes year to year comparison data. Also included are various results based on the Outcomes set by the Board.

The Annual Report may utilize "data dashboards" in table format that will include longitudinal data. Results will be articulated based upon the previously established Board approved reports.

Associate Director, Dr. Mary Hopewell, with oversight from Executive Director, Dr. Walt L. Hanline, will provide the Charter an Annual Report that addresses both the priorities of the Charter and the compliance requirements of LCAP.

*[Product: Annual Report.]*

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## ADDENDUM 5

### Strategic Planning Workshop Logistics

#### Day 1

- LCD projector and screen will be available. ***Please note that we will need the consultant's laptop and keyboard to be placed on a table, with the screen to the back of the presenter. The LCD needs to plug into the laptop that is on the table (Note: it is vitally important the Technology staff provide a direct cord from the LCD to the laptop and keyboard that will be on a table);***
- The participants (*ideally not less than 20, nor more than 40*) should be at tables of 4-6 individuals, facing the screen. (*In essence length wise, with two people on each side and someone at the head of the table.*)
- Room set-up should be such that the participants can see one another and also have clear visibility to the screen and presenter
- Name plates for each participant that are color coded by group ... **teachers**, **administrators**, **community**, and **classified staff** on four different colors/or with colored dots)
- Chart stand and blank chart stand sized **self-stick** easel pad chart pages [alternatively, blue painter's tape can be utilized to secure non-stick chart paper] are available
- Access to a computer (*normally access to the support from a secretary, so that (s)he can print the needed documents from a flash drive provided to him/her*) with a printer and a copier machine to print documents, as needed during the day
- One letter sized writing tablet for **each table**
- Pencil and pen for each participant



## **Day 2**

The focus of the day will be developing the Outcomes and Metrics that will be used to measure progress in addressing the objectives established by the National Center.

**Participants for the workshop, normally staff members, must have been part of the Stakeholder group working on Day 1. Ideally, there should be at least one individual who has knowledge related to each of the objectives.** An individual may have knowledge of multiple objectives, which will reduce the number of individuals needed for Day 2. The following will need to be addressed by the Charter.

- LCD projector and screen will be available. ***Please note that we will need the consultant's laptop and keyboard to be placed on a table, with the screen to the back of the presenter. The LCD needs to plug into the laptop that is on the table (Note: it is vitally important the Technology staff provide a direct cord from the LCD to the laptop and keyboard that will be on a table).***
- The participants (*ideally not less than 10, nor more than 20*)
- We will be using a **Google Docs process** which will require each team member to **have a Notebook or Laptop for their use, and access to the Internet.** (Technology staff will need to be available to assist, when needed)
- The following is a unannotated list of the materials to be provided by the Charter
  - ✓ LCD and Screen
  - ✓ Notebook or Laptop
  - ✓ Computer and Copier Access
  - ✓ Legal Pad for Each Participant
  - ✓ Name plates for each participant, with distinctive colors for management, teachers, classified, and community

## **Day 3**

The focus of the day will be working with the Board in establishing the foundation block for fiscal integrity and in the ranking of the Objectives. The Board will review the work from Day 1 and Day 2 and provide direction for the final stages of the development of the Strategic Plan. The following logistics will need to be addressed by the Charter.

- LCD projector, speakers that plug into a laptop and a screen will be available. *Please note that we will need for the consultant's laptop and keyboard to be placed on a table, with the screen to the back of the presenter. The LCD needs to plug into the laptop that is on the table*  
**(Note: it is vitally important the Technology provide direct cord from the LCD to the laptop and keyboard that will be on a table)**
- The Board members and superintendent should be at an U-shape set of tables, facing the screen and presenter. The presenter's table will complete a square, with the projector behind the presenter
- Room set-up - should be such that the participants can see one another and also have clear visibility to the screen and presenter
- The room must include a **blank wall, at least 20 feet long**
- Name plates for each participant
- Pencil or pen for each participant
- Board agenda is properly posted – Board Study Session: Team Building (no action to be taken);

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## **ADDENDUM 6**

### **Consultants**



**Walt L. Hanline, Ed.D.**  
**Founder and Executive Director:**  
**National Center for Executive Leadership and School Board Development**

Dr. Walt Hanline is the Executive Director for the National Center for Executive Leadership and School Board Development. He worked as a public school superintendent in California for 28 years, in Charters ranging from 170 to 12,000 students. He served as Superintendent/Principal of Kings River-Hardwick Charter, Del Norte County Unified Superintendent of Schools, and Superintendent of Ceres Unified Charter, where he retired from in June 2010. Since retirement, he has also served as Interim Superintendent in Natomas Unified Charter, Denair Unified Charter and presently is serving in Oregon as the “part-time” Superintendent of Lowell Charter.

Dr. Hanline was recognized by the Association of California School Administrators as the 1995 California Superintendent/Principal of the Year and in 2007 as the California Superintendent of the Year. In 2009, the Ceres Unified Board of Directors named its next new elementary school the Walt L. Hanline Elementary School.

Dr. Hanline served as an Executive Search Consultant with Education Leadership Services and the California School Boards Association and as an Affiliate and Adjunct Professor at California State University, Stanislaus, teaching both at the Masters and Doctoral levels. He is frequently sought as a presenter by Charters and organizations across the nation. Dr. Hanline presents workshops for teachers, administrators and board members in team building, strategic plan development, collective bargaining, superintendent evaluation, and board governance.



**Mary A. Hopewell, Ed.D.**  
**Associate Director:**  
**National Center for Executive Leadership and School Board Development**

Dr. Mary A. Hopewell has served in public schools as a middle school and high school teacher for 10 years and as a middle school and high school administrator for 14 years.

As a teacher she opened a new middle school and as Principal of Dublin High School she lead her school to state honors. Her expertise in developing leaders, applying interest based solutions with outcomes to system challenges, and utilizing facilitation skills that make learning irresistible have lead to her being sought out by educational stakeholders from teachers and support staff to site administrators and superintendents in order to assist their respective efforts in the change process and the development of principled leaders.

Mary provides coaching to and delivers products for individuals seeking career advancement and facilitates conversations with site and Charter teams resulting in conceptual design frameworks that lead to implementation of organizational initiatives. She utilizes a variety of best practices and the research from DuFour, Elmore, Fullan, Lecioni and Marzano to increase student learning, develop leaders, and construct products that address the needs of the individual and organization.

Her work as a senior research associate for WestEd resulted in her providing direct technical support on behalf of ADE, CDE, and NDE as an educational reform leader. Her service included assisting Phoenix Union High Charter and Yuma Charter One in Arizona; Calexico, Napa Valley and San Francisco Unified Charters in California; and Clark County Charter in Nevada to name a few.

She has also presented a variety of workshops and strategic planning development sessions for the California Department of Corrections and the Association for Dispute Resolution of Northern California. She is a certified trainer of trainers for NASSP Breaking Ranks II.

Mary earned her Master's degree from St. Mary's College of California and her Doctorate degree from the University of La Verne. She is an Adjunct Professor at Concordia University, Irvine teaching leadership at the Masters and Doctoral levels



**Fred Van Vleck, Ed.D.**

**Consultant:**

**National Center for Executive Leadership and School Board Development**

Dr. Fred Van Vleck has served in public schools for 21 years, 16 of which has been in administration. He has served as a Teacher, Assistant Principal, Principal, Director of Curriculum and Instruction, Assistant Superintendent of Business Services and Superintendent in Charters ranging in size from 130 students to 12,000 students. Since 2012, he has been the Superintendent of Eureka City Schools, a Pre K-12 Charter on the North Coast of California.

Dr. Van Vleck earned a bachelor's degree with a double Major of Agriculture Business and Agriculture Science, along with his Master's in Agriculture from Cal Poly San Luis Obispo. He went on to earn his Doctorate in Education Administration from the University of the Pacific. A few of his career accomplishments include serving as founding principal of Central Valley High School, which was recognized as a top 100 high school in the United States by US News and World Report. He has managed over \$250 million in new construction and modernization projects and led his Charter in the recent passing of a local school bond of over \$49 million. Dr. Van Vleck is a State Certified Chief Business Official and has effectively managed Charter and school budgets of over \$100 million. He has done so through the recent recession, while maintaining Board priorities. He is also a certified administrative coach helping future administrators earn their California Clear Administrative Credential.

Dr. Van Vleck was recognized in 2017 by the California Association of the Future Farmers of America as the California State Star Administrator. He understands the role of a Board member, as he also serves on the Humboldt County Fair Board of Directors. Dr. Van Vleck is a graduate of the CSBA Masters in Governance Program.

Dr. Van Vleck has been a presenter in many Charters, including presenting for the Association of California School Administrators and the California School Board Association. He has served on the CSBA Annual Conference Committee and currently serves on the CSBA Superintendent's Advisory Panel. He presented at the 2017 California School Boards Association Annual Conference on the implementation of a Strategic Plan. Dr. Van Vleck is also an accomplished auctioneer who has raised in excess of \$500,000 for charities, primarily focused on serving school age children.

**CONSULTANT GROUP #3:**

**THIRD PLATEAU SOCIAL IMPACT STRATEGIES**



To: Megan Lao, Urban Charter Schools Collective  
From: Jonathan Kaufman, Third Plateau  
Re: Strategic Planning  
Date: April 30, 2018

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Thank you for the opportunity to submit this proposal to facilitate the strategic planning process for Urban Charter Schools Collective (UCSC). After our call earlier this month, our team came together to brainstorm how we can best support your work and position UCSC for meaningful and sustainable impact; our recommended process is outlined below. As I mentioned during our phone call, this memo should be read as an *initial* proposal; please do not hesitate to let us know how we can further customize this so as to make this engagement even more valuable for you and the UCSC team.

### THE OPPORTUNITY

Though UCSC was designed to grow into a full charter management organization, the Superintendent and Board of Directors have largely been in the weeds helping to manage the single K-6 school instead of working to build the organization. There are a number of drivers creating this reality, but one of the key missing pieces is a coherent, specific, and inspiring strategic plan for the overall organization. If UCSC's Board and leadership can gain clarity around who they are, what they do, and how they do it, the team will be well positioned to shift out of the day-to-day management of the K-6 school and into higher-level strategic growth and governance.

### SCOPE OF WORK

Outcome-oriented strategic planning requires soliciting positive and critical feedback, acquiring a deep understanding of diverse stakeholder perspectives, openness to new ideas, and recognition that the very best strategy is a result of experimentation and constant iteration and improvement.

Our strategic planning work is tailored to the needs of each individual client. The following are the three levels of engagement we believe would best position UCSC to capitalize on this opportunity:

#### OPTION A: Low intensity

This option is focused entirely on a strategic planning retreat, bringing together the board and leadership for a full-day of brainstorms, discussions, and prioritization. This is the quickest and most affordable of the three options.

1. **Pre-retreat interviews** – Third Plateau will conduct 45-minute 1:1 phone interviews with up to 6 members of UCSC's Board or leadership to better understand what is and isn't working well at UCSC. Through these conversations we will seek to uncover common themes that can inform the substance and design of the strategic planning retreat.
2. **Strategic planning retreat** – Third Plateau will design and facilitate a full-day retreat for UCSC's Board and leadership. This retreat will focus on setting UCSC's purpose and 3-year goals; identifying the roadblocks to achieving those goals; and shaping strategies to overcome those roadblocks.

3. **Post-retreat memo** – Third Plateau will capture the notes from the retreat, summarize them into key takeaways, and offer concrete recommendations regarding next steps for the organization.

**Deliverable:** post-retreat memo

**Budget:** \$7,000

**Timeline:** July – August

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#### OPTION B: Moderate Intensity

This option is designed to provide more structure and support than the low-intensity option, while remaining relatively quick and affordable.

1. **Stakeholder interviews** – Third Plateau will conduct 45-minute 1:1 phone interviews with up to 12 individuals in and around UCSC (such as Board members, leadership, school staff, parents, funders, etc.). Through these conversations we will seek to gain an objective, 360° understanding of UCSC's current reality.
2. **Landscape research** – Third Plateau will conduct industry research into 2-3 specific questions relevant to UCSC's work and future. These questions will be scoped in partnership with UCSC's leadership. Potential research questions include: What is the current charter landscape in the Sacramento region? What are the most common models for how charter management organizations are structured? What are best practices of Board of Directors for charter management organizations? Findings from this research will be summarized in a memo to UCSC's board and leadership.
3. **SWOT analysis** – Third Plateau will draft a SWOT Analysis (Strengths, Weaknesses, Opportunities, Strengths) that captures the key takeaways from the stakeholder interviews and provides the Board and leadership a candid snapshot of the organization.
4. **Strategic planning retreat** – Third Plateau will design and facilitate a full-day retreat for UCSC's Board and leadership. This retreat will begin with an engaging discussion anchored in UCSC's SWOT analysis and Third Plateau's research, then shift to leverage that information to set UCSC's purpose and 3-year goals; identify the roadblocks to achieving those goals; and shape strategies to overcome those roadblocks.
5. **Post-retreat memo** – Third Plateau will capture the notes from the retreat, summarize them into key takeaways, and offer concrete recommendations regarding next steps for the organization.

**Deliverables:** landscape research memo; SWOT analysis; post-retreat memo

**Budget:** \$15,000

**Timeline:** July – September

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#### OPTION C: High Intensity

This option is designed to provide UCSC with a holistic and comprehensive strategic planning process. Third Plateau will approach this option through a multi-phased process:



### Pre-Planning

Prior to starting the planning work, Third Plateau will work with UCSC leadership to identify and invite key stakeholders to be part of a Steering Committee. This committee helps drive the process and serves as the project's brain trust, ensuring the developing plan meets UCSC's needs. The most effective Steering Committees are comprised of 5-10 individuals with diverse organizational vantage points (senior leadership, board members, staff, etc.).

Once the Committee is in place, Third Plateau proposes to take a three-phase approach:

### Phase 1: Learning

To begin, Third Plateau will work with UCSC to understand the organization's internal and external landscape. To do this, Third Plateau will:

- **Facilitate Kick-Off Meeting** – Identifying the right questions is an essential first step to finding the right answers. In service of this, Third Plateau will facilitate a kick-off meeting with the Steering Committee to brainstorm and select the key questions UCSC seeks to answer through the strategic planning process.
- **Review Internal Documents and Data** – Third Plateau will review UCSC's past and current strategic documents and any data UCSC has available regarding inputs, outputs and/or outcomes. This review process is designed to help bring Third Plateau "up to speed" on where UCSC is today.
- **Stakeholder Interviews** – Third Plateau will interview ~20 representatives from relevant internal and external stakeholder groups to get a 360° understanding of the organization's priorities, needs, and opportunities. Likely stakeholders include, but are not limited to: UCSC board members, staff, students and parents, strategic partners, issue experts, and funders. This phase will generate buy-in to the strategic planning process and ensure we understand UCSC as an ecosystem rather than a collection of isolated program components.
- **Landscape research** – Third Plateau will conduct industry research into 3-4 specific questions relevant to UCSC's work and future. These questions will be scoped in partnership with UCSC's leadership. Potential research questions include: What is the current charter landscape in the Sacramento region? What are the most common models for how charter management organizations are structured? What are best practices of Board of Directors for charter management organizations? Findings from this research will be summarized in a memo to UCSC's board and leadership.
- **SWOT analysis** – Third Plateau will draft a SWOT Analysis (Strengths, Weaknesses, Opportunities, Strengths) that captures the key takeaways from the stakeholder interviews and research, providing the Board and leadership a candid snapshot of the organization.

Deliverables for the Learning Phase include:

- A high-level organizational SWOT analysis that incorporates insights from all stakeholders
- A memo summarizing the key findings and implications from the landscape research

**Phase 2: Ideation**

Upon completion of Phase 1, Third Plateau will work with UCSC to identify, analyze, and prioritize the strategic options available to UCSC. To do this, Third Plateau will:

- **Facilitate Planning Retreat** – Third Plateau will lead a retreat at which Third Plateau will work with the Steering Committee to articulate core goals, identify the critical hurdles in the way of achieving those core goals, and begin to develop key strategies to overcome the identified hurdles. The retreat will be highly collaborative and hands-on, ensuring that the participants are the driving voice of the plan and that the needs of the organization are being addressed effectively and holistically.

Deliverables for the Ideation Phase include:

- A Logic Model and/or Theory of Change that defines “success” for UCSC
- An articulation of the vision for UCSC and the 2-5 core goals over the next five years

**Phase 3: Iterative Design**

With a host of ideas emerging from the retreat, Third Plateau will spearhead the effort to organize and plan for implementing and testing organizational strategies. To do this, Third Plateau will:

- **Draft Strategic Plan** – Third Plateau, in partnership with the Steering Committee, will synthesize the outcomes of the retreat to create the first draft of the strategic plan outline.
- **Conduct Stakeholder Feedback Interviews** – Third Plateau will interview select internal and external stakeholders to float potential strategies, gauge reactions, and acquire feedback.
- **Revise Strategic Plan** – Based on the feedback received, Third Plateau will revise and strengthen the draft strategic plan outline.
- **Facilitate Feedback Session** – Third Plateau will reconvene the Steering Committee to solicit feedback on the revised plan, identify unanswered questions, think through the implementation timeline, and brainstorm the budgetary implications.
- **Prepare for Implementation** – Third Plateau will incorporate feedback and finalize the strategic plan outline. As part of this process, Third Plateau will provide a framework for UCSC to use its programs to test any assumptions in its Theory of Change. The final outline will formalize the implementation

timeline, create a budgetary snapshot, and identify the key metrics and milestones of the plan.

Deliverables for the Iterative Design Phase include:

- A finalized strategic plan

As should be clear in the descriptions above, we view ourselves both as the facilitator and as your thought partner in the strategic planning process and expect the end product to be the result of engaged discussions among key stakeholders. The planning is iterative and intended to identify and resolve key concerns early in the process while simultaneously creating an environment for productive collaboration from the outset. We believe that this process results in clarity of direction and purpose and lays the foundation for effective collaboration among the entire team moving forward.

Deliverables: SWOT analysis;

**Budget: \$40,000**

**Timeline: July – December**

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## HOW WE THINK ABOUT STRATEGIC PLANNING

Great strategic planning is not one-size fits all; each organization has nuances and therefore requires a unique and fully customized approach. That being said, we have found a few elements inherent to any successful strategic planning process:

1. **It's your strategic plan, not ours.** Our job is to facilitate and ensure the process is moving forward in a healthy, productive way. We seek to cultivate a space with the right people, the right information, and the right environment so that strong ideas emerge and *you* are best supported to shape the future of UCSC. We are not here to tell you your strategy; we're here to enable you to shape your own future.
2. **Our goal is action.** As an impact-focused firm, we cringe at the idea of creating a binder that sits on a shelf and gathers dust. Instead, we drive to help you create a living, breathing, actionable strategic plan that can grow and evolve as UCSC continues to evolve, always focused on how UCSC can best realize its vision and positively impact its students and community.
3. **The process is more important than the product.** Even the greatest strategy in the world won't mean much without the buy-in of the people who are going to implement it. Therefore, we work to bring all stakeholders into the fold from the beginning, empower them to have a voice in the process, and ensure they stay informed as decisions are made and the plan takes shape.

## WHO WE ARE

Third Plateau is a multi-disciplinary social impact strategy firm that partners with bold visionaries in the social sector to drive meaningful, substantial, and sustainable change.

## Our Philosophy

At our core, Third Plateau is a social impact accelerator. We partner with the people and organizations that have game-changing ideas for improving the world and help them do it bigger, better, and faster. Our work is driven by five key principles:

- We only work with the best. True innovation and meaningful change are difficult to achieve; we work with the organizations that we believe are inspired by and capable of meeting those challenges.
- Big ideas and creative problem solving excite us. We are at our best when we are formulating, thinking through, and executing new thinking.
- Knowledge is absolutely essential to effective innovation. We are intensely curious and are voracious consumers of information and ideas from a variety of disciplines.
- Metrics and evaluation are cornerstones of effective programming. We cannot meaningfully strive for change without a clear definition of “success” and the strategy and means by which to track impact.
- Relationships and networks are how change happens. Relationship development is at the core of our work and we are very intentional about how we curate networks for maximum social impact.

## Our People

We take a team approach to all of our work, meaning that at some point during this engagement, our entire team will work on this project. The bios of some of our team members are below:

**JONATHAN KAUFMAN** is co-founder & Principal of Third Plateau Social Impact Strategies. In this role, Jonathan collaborates with nonprofits, philanthropists, and social entrepreneurs all over the world, helping them expand and deepen their impact. He specializes in business and strategic planning, metrics development, community engagement, and impact assessment for a wide array of Third Plateau’s clients.

Jonathan draws on his unique experiences building the capacity of nonprofits here at home and around the world. Prior to launching Third Plateau, Jonathan lived in St. Louis, where he consulted for a number of organizations, including volunteer management strategies for the local PBS affiliate, earned revenue models for an employment assistance agency, pricing strategies for a national women’s rights nonprofit, and inventory and operations optimization for a foster care organization. While living in Athens, Greece, he worked as the Special Programs Director at Caritas Athenas Refugee Center, helping refugees from Somalia, Guinea, Afghanistan, and Iraq settle and restart their lives in the European Union. At Caritas, he increased the soup kitchen capacity five-fold and developed comprehensive language and culture courses for the agency’s clients.

Prior to moving to Greece, Jonathan served as the Housing Coordinator at Step Up on Second, a Santa Monica-based nonprofit that provides services to homeless men and women suffering from severe mental illness. At Step Up, Jonathan expanded the agency's housing services, oversaw over 3,000 housing cases, and wrote the comprehensive homeless housing guide, Step Up on Second's Guide to Housing, which is still used by Los Angeles County to train every housing coordinator in the county. Jonathan also worked in Chicago as the Regional Director at Campus Kitchens Project, a national hunger-relief nonprofit. There, he grew the client base four-fold, initiated culinary employment training programs for Chicago's unemployed, and oversaw the organization's national expansion efforts.

Jonathan currently serves on the Board of Directors at Women's Empowerment and the Advisory Board at Resonate. Jonathan is a former member of the NationSwell Council, and board member of Amir Project, Good Shepherd Children and Family Services, One Percent Foundation, and the Alumni Board at Education Pioneers.

Jonathan holds a B.A. in Religion and Political Science from Vassar College and an MBA in Nonprofit Management and Social Entrepreneurship from Washington University in St. Louis, where he was a Danforth Scholar, received the Dean's Award for Corporate Social Responsibility, and graduated at the top of his class.

Jonathan currently lives in Sacramento, CA with his wife, Joanna, and their two kids, Oliver and Louisa. Joanna's an archaeologist who makes Indiana Jones look like a chump, while Ollie thinks he's a dinosaur and Baby Lou mostly just drools on her brother's toys. Together, the four of them travel the world, eat more BBQ than any human should, and are embarking on Phase VII of their world domination plans.

**SOMOH SUPHARUKCHINDA** is a Director at Third Plateau, where she supports nonprofit and philanthropic clients to increase their social impact. Her passion for social impact stems from an international upbringing in low-income countries and a decade of experience working with nonprofits, governments, and private actors, particularly in the education sector.

Prior to Third Plateau, Somoh worked as the Director of Growth Strategy & Development Communications for Teach For All, a nonprofit that aims to cultivate the leadership capacity to expand educational opportunity around the world. In this role, she managed donor communications strategy and systems, aligning programs and philanthropic interests to generate more than \$22M annually. Somoh also served in policy roles at the New York City Department of Education and the Colorado Department of Education (CDE), supporting educators in data-driven inquiry and improvement planning. In Colorado, she led the implementation of state accountability legislation across 178 districts and helped the CDE become one of the first nine states waived from No Child Left Behind provisions.

Additionally, Somoh brings a range of program, research, and evaluation experience. This includes managing teacher placement and matriculation for Teach For America; co-designing a JUMP! Foundation leadership summit for secondary students across Africa; developing curriculum for Empowering Students to Improve the World; and investigating the impact of California's Paid Family Leave Act on working mothers.

Somoh holds a B.A. in Psychology from Claremont McKenna College and an M.A. in International Education Policy from Harvard University. She lives in San Francisco with her husband, Mike, and enjoys California sunshine, Pacific Northwest summers, outdoor adventures, and her mother's Thai cooking.

**PAUL PERRY** is a Director with Third Plateau Social Impact Strategies. In this role, Paul works with social impact ventures around the world to improve outcomes alongside the communities they serve. He specializes in learning systems, strategic planning, community engagement, and public innovation.

Paul grew up in a racially and socioeconomically diverse community (called Norristown, PA) just outside of Philadelphia. His mother was pregnant with him while in prison due to her drug addiction being criminalized during the failed "War on Drugs." Paul was adopted by his two fathers—gay parents—at birth and raised in a household with incredible dads who were both veterans and small business owners. His early childhood experiences pushed him to serve others in education and social justice work.

Prior to joining Third Plateau, Paul most recently served as Executive Director for COLAGE, the only national nonprofit that directly empowers and supports youth with LGBTQ parents and caregivers. COLAGE co-leads the largest gathering of LGBTQ-led families in the country on a yearly basis along with serving thousands of youth across the nation.

Before COLAGE, Paul spent most of 2016-2017 traveling the world with Remote Year, visiting over 20 countries across five continents while focusing on writing and remote social impact consulting with organizations such as Argonne, Camelback Ventures, TransferWise, and CompetencyWorks.

In his past lives, Paul has worked as a middle school teacher and debate coach, assistant school leader, school designer, and nonprofit executive. He was part of a team that designed and launched three competency-based high schools in New York City, the nation's largest school district. Paul also served as Executive Director for The Reset Foundation, an initiative to keep young people out of prison and providing them with educational and career opportunities as an alternative to incarceration.

In terms of community leadership, Paul previously served six years as a Board member and two years as Board Chair with COLAGE. He also served as a volunteer instructor with the Prison University Project at San Quentin during his graduate studies at Berkeley.

Paul holds a B.A. in Political Science and International Studies from American University and a Master in Education from the University of Pennsylvania. Paul went on to earn a Master of Public Policy degree from University of California at Berkeley and a Doctor of Education Leadership degree from Harvard University.

Paul currently lives in Philadelphia, PA with his canine companion Astaire and spends lots of time with his father P.D. Perry. Paul and Astaire go for long walks chasing

squirrels and other dog friends. Paul and his Dad try to get dinner together weekly and sometimes catch a movie together at their favorite local theater, the Movie Tavern. Paul can be found biking around the City of Brotherly Love, scouring the interwebs for flight deals, watching zombie flicks with awful reviews, and checking out the newest bar trivia haunts (it's called "Quizzo" in Philly).

**AMANDA PLASENCIA** is one of Third Plateau's Analysts. She will help the team gain context around our projects through research and synthesis of resources.

Before starting at Third Plateau, Amanda lived in the world of education for 8 years. Upon graduating from UC Davis with B.As in Political Science and Spanish, she served as a Teach For America corps member and fell in love with helping to support young people learn to love learning. She taught 7th grade life science, yes that means sex ed, at the Wright Middle School in Chelsea, Massachusetts for three years and then enrolled at the Harvard Graduate School of Education to obtain her Ed.M in Prevention Science and Practice.

She then returned to her hometown of Sacramento, CA where she served as the PBIS and Advisory Coordinator at Sacramento Charter High School. After three years in that role, she worked as an interim high school counselor at Cristo Rey High School, working with low-income students develop stronger plans to get to and through college.

Wanting to expand her experience, Amanda began working for My Sister's House, a nonprofit supporting women and children escaping domestic violence and sexual assault as a development coordinator. She also has volunteered and continues to volunteer at the Sacramento Food Bank in the Legal Immigration Services. Amanda is here to bring her passions about education and immigration reform to Third Plateau.

Amanda lives in Sacramento, her beloved hometown. She loves to watch Bob's Burgers and reruns of 30 Rock and Parks and Rec and also hike and explore Northern California in her spare time. You can also find her playing indoor soccer on Wednesday nights with about 5 members of her family and a host of family friends. They sometimes win.



***Calendar C:*** Certificated-General Education Teacher, 180 days per school year and does not work on school defined holidays.

Teachers workday begins at 7:45 a.m. and ends at 3:00 p.m. Teachers will have 1 hour during the school day for grade level collaboration and will be expected to utilize the 3-5pm time to prep at administrators/teachers' discretion. For example, they can meet on or off campus. \*Whereas administrators can meet with teachers at a designated time or upon request of teachers. The first and third Thursday are required staff meetings. In addition, teachers will be expected to attend all scheduled trainings.





Academy Council Approved, 5/24/18

VERSION 3

Tuesday, May 29, 2018



# YPSA SUPPORT PLAN

## Implementing Conceptual/Integrated Curriculum and Instruction

Presented By: Principal Vince Xiong

Reviewed By: Academy Council

7555 South Land Park Drive, Sacramento, CA 95831

## **ACKNOWLEDGEMENT**

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### Original Design Team

Principal Vince Xiong  
Grade 1 Teacher Claudia Sherry  
Grade 3 Teacher Michelle Lee  
Grade 4 Teacher Kelly Thao  
Grade 5 Teacher Alyssa Palermini  
Superintendent Lee Yang as Facilitator

### Sherwood Charter School Visitation Design Team

Dennis Mah, Board Member  
Yong Lor, Board Member  
Guy Ollison, Board Member  
Lee Yang, Superintendent  
Vince Xiong, Principal  
Amanda Vang, 2<sup>nd</sup> Grade Teacher  
Michelle Lee, 3<sup>rd</sup> Grade Teacher  
Kelly Thao, 4<sup>th</sup> Grade Teacher

### Contributors

**Kindergarten Team** - Mai H. Vang, Rick Xiong, Ying Vang

**First Grade Team** - Claudia Sherry, Caitlin Choi, Mary Xiong

**Second Grade Team** - Amanda Vang, Kala Toscano, Jeongok Gabbani

**Third Grade Team** - Michelle Lee, Katelyn Hayes, Richelle Rodriguez

**Fourth Grade Team** - Kelly Thao, Gina Tamburrino, Felipe Silva

**Fifth Grade Team** - Alyssa Palermini, Pao Xiong, Steven Yang

**Sixth Grade Team** - Dao Yang, Mary Cherney, Linh Le-Tran

**Hmong Language Development Team** - Surapong Lee, Kou Vang, Xee Vang

**Movement Team** - Stacie Fisher, Joseph Velez, Leeseng Thao

### **Background Information**

At the March 12, 2018 Board meeting, the UCSC Board directed staff to develop an “HET Implementation Plan” to be presented at their April Board meeting. After the presentation of the HET Implementation Plan, the Board recommended that staff to visit Sherwood Charter School in Oregon to gain a deeper understanding of HET and be able to create better plan to support the school. As such, arrangements were made for 8 individuals (Three Board Members, the Superintendent, the Principal, and three teachers) to visit Sherwood Charter School for a duration of three days.

The goal was to visit Sherwood Charter School and, from the visit, be able to design a HET plan with a focus on conceptual and integrated thematic instruction. The purpose of the HET plan is to improve scholar learning and performance by supporting teacher capacity development in the area conceptual and integrated thematic planning and teaching.

The Sherwood Charter School Visitation & Design Team came back with the focus of continuing the work that was started in Sherwood to support teachers with conceptual planning and integrated thematic curricula.

This plan is specific to Priority 1: Curriculum and Instructional Support for all Teachers and will cost approximate **\$71,003** to implement. The Plan is divided into seven components, and the specifics are detailed on the following pages.

### **Priority 1: Curriculum and Instructional Support to all Teachers-HET IMPLEMENTATION PLAN**

#### **Need:**

1. There is a need for each classroom teacher to be able to design a HET conceptual and integrated thematic curriculum that aligns with the body brain compatible education model.

#### **Goal:**

1. By the end October 2018, all classroom teachers will have the foundational knowledge and skills to design a conceptual and integrated thematic curriculum that incorporates Common Core State Standards of ELA/ELD, Math, Science, HSS, and the Lifelong Guidelines & LIFESKILLS.

**Component One: Mapping it Out**

Concept: Transformation

Care Package: Skype Joy Raboli, Principal, Sherwood Charter School

(Homework: All grade levels to chunk their social studies and science standards together and bring to Day 1 meeting and think of questions to ask Joy about HET/Curriculum Planning)

<b>When will this action take place?</b>	<b>Action Needed to Achieve the Goal</b>	<b>Who will be participating in this?</b>	<b>How will this action be done and assessed?</b>	<b>Budget Needed to Support the Identified action</b>
5/11/18 Friday	Team reviews yearlong theme developed from Sherwood and puts together a revised plan for presentation and updates to the Board	Amanda Vang Kelly Thao Michelle Lee Vince	Agenda, Sign-in sheet, revised plan	\$480  (\$40/hr X 4 hours X 3 Teachers)
5/18/18 and 5/25/18 Fridays	Setting the Stage for HET – Amanda, Michelle, and Kelly create a model HET classroom in the PD Room which will include what is to be expected in each classroom. <ol style="list-style-type: none"><li>1. Yearlong Theme</li><li>2. Lifelong Guidelines and LIFESKILLS</li><li>3. Multiple Smarts</li><li>4. Agenda for training when training takes place</li><li>5. Learning Clubs</li></ol>	Amanda Vang Kelly Thao Michelle Lee Vince	Creating and posting of Yearlong Theme. Creating and posting of LG/LS. Creating and posting of Multiple Smarts. Writing up of Agenda when training takes place. Materials identified and purchased with supply requisition and/or invoices.	\$610  (\$250 for purchases of items needed, \$40/hr for 3 hours X 3 Teachers)
To be done between 5/18 and 5/28	Pre-planning for 5/29, 5/30 and 5/31 training	Amanda Vang Kelly Thao Michelle Lee Vince	Agenda, Sign-in sheet, Training presentations and packets, Training Evaluation	\$720  (\$40/hr X 6 hours total X 3 Teachers)

When will this action take place?	Action Needed to Achieve the Goal	Who will be participating in this?	How will this action be done and assessed?	Budget Needed to Support the Identified action
5/29/18 Tuesday	Training on Conceptual Planning and Thematic Curriculum, Day 1, 3:00 – 5:00 <ol style="list-style-type: none"> <li>1. The Biology of Learning. What is HET?</li> <li>2. What is conceptual/thematic planning?</li> <li>3. Sample and Examples</li> <li>4. Themes, Components, Concepts</li> <li>5. Overview of YLT</li> </ol>	Core HLD Movement  (Training to be provided by Amanda, Kelly, Michelle, Vince)	Agenda, Sign in sheets, Presentation packets and trainings evaluations	\$240  (\$200/hr for Joy)
5/30/18 Wednesday	Training on Conceptual Planning and Thematic Curriculum, Day 2, 3:00 – 5:00. <ol style="list-style-type: none"> <li>1. Creating the Grade Level YLT</li> <li>2. Putting Social Studies and Science standards into the curriculum map</li> <li>3. Putting concepts, being-there experiences, standards into the curriculum map.</li> </ol>	Core  (Training to be provided by Amanda, Kelly, Michelle, Vince)	Agenda, Sign in sheets, Presentation packets and trainings evaluations	\$240  (\$40/hr for 2 hours X 3 Teachers)
5/31/18 Thursday	Training on Conceptual Planning and Thematic Curriculum, Day 3, 3:00 – 5:00. <ol style="list-style-type: none"> <li>1. Put in ELA and Math standards</li> <li>2. Put in assessments to support teaching and learning</li> <li>3. Grade level teams to present their YLT for feedback</li> </ol>	Core  (Training to be provided by Amanda, Kelly, Michelle, Vince)	Agenda, Sign in sheets, Presentation packets and trainings, evaluations	\$240  (\$40/hr for 2 hours X 3 Teachers)
6/4/18 - Ongoing	Check in with all teachers regarding Mapping it Out. <ol style="list-style-type: none"> <li>1. Amanda Vang to check in with Ying, Rick, Mai, Caitlin, Claudia and Tracy</li> <li>2. Michelle Lee to check in with Kala, Vangdan, Katelyn, Richelle, Gina, and Felipe</li> <li>3. Kelly to check in with Alyssa, Pao, Steven, Dao, Mash, and Linh</li> <li>4. Vince and Julia to check in with HLD and Movement</li> </ol>	Core HLD Movement	Check in Google Form, Notes, Checklist, Observation and improvement in the areas identified, Reflection & Self-Evaluation	\$960  (\$40/hr X 8 Hours X 3 Teachers)

**Component Two: Laying Out the Campsite**

Concept: Creativity

Care Package: Samples of Unit Binder

When will this action take place?	Action Needed to Achieve the Goal	Who will be participating in this?	How will this action be done and assessed?	Budget Needed to Support the Identified action
To be done between 5/18 and 6/1/18	<p>Pre-planning for 6/4 training, including development of Sample Grade Level Unit Binder</p> <p>Purchase materials needed to support the creation of the Unit binders (Binders, dividers, other items as identified by teachers)</p>	Amanda Vang Kelly Thao Michelle Lee Vince	Agenda, Sign-in sheet, Training presentations and packets, Training Evaluation	\$1020  \$720 ((\$300 for binders/materials)  (\$40/hr X 6 hours total X 3 Teachers)
6/4/18 Monday	<p>Training on Conceptual Planning and Thematic Curriculum Using the Integration Curriculum Planning Sheet (3:00 – 5:00), Day 1</p> <ol style="list-style-type: none"><li>1. Introduce Integration Curriculum Planning Sheet</li><li>2. Model how to complete the planning sheet</li><li>3. Use the planning sheet to design first unit.</li><li>4. Provide opportunities for grade level teams to work on first unit for two weeks during collaboration and will come back on June 13<sup>th</sup> for review</li></ol>	Core  (Training to be provided by Amanda, Kelly, Michelle, Vince)	Agenda, Sign in sheets, Presentation packets and trainings, evaluations	\$240  (\$40/hr for 2 hours X 3 Teachers)

When will this action take place?	Action Needed to Achieve the Goal	Who will be participating in this?	How will this action be done and assessed?	Budget Needed to Support the Identified action
6/5/18 – 6/12/18	Check in with all teachers regarding Integration Curriculum Planning <ol style="list-style-type: none"> <li>1. Amanda Vang to check in with Ying, Rick, Mai, Caitlin, Claudia and Tracy</li> <li>2. Michelle Lee to check in with Kala, Vangdan, Katelyn, Richelle, Gina, and Felipe</li> <li>3. Kelly to check in with Alyssa, Pao, Steven, Dao, Mash, and Linh</li> <li>4. Purchase of 21 3-inch binders and dividers</li> </ol>	Core	Check in Google Form, Notes, Checklist, Observation and improvement in the areas identified, Reflection & Self-Evaluation	\$1380 (\$40/hr X 8 Hours X 3 Teachers) \$420 for binders/dividers
6/13/18 Wednesday	Joy Raboli to visit all classrooms to determine the level of training and support needed (8:00 – 3:00). Meet with teachers for introductions to conceptual planning and thematic curriculum (3:00 - 5:00) <ol style="list-style-type: none"> <li>1. Meet with Vince to go over current state of YPSA</li> <li>2. Visit classrooms to see curriculum, instruction, and learning.</li> <li>3. Meeting with Core Staff</li> </ol>	Core	Agenda, Sign in sheets, Presentation packets and trainings, evaluations	\$2000 per day
6/14/18 Thursday	Joy Raboli in PD room. Each grade level to work with Joy per hour to go over their YLT, curriculum map, and first unit (8:00 – 3:00). <ol style="list-style-type: none"> <li>1. Schedule created for each grade to work with Joy during their prep hour.</li> <li>2. Meeting with Core staff for commendations and next steps (3:00 – 5:00)</li> </ol>	Core	Agenda, Sign in sheets, Presentation packets and trainings, evaluations	\$2000 per day

### **Component Three: Packing Our Survival Kit**

Concept: Survival

To be planned out before the end of the school year, introduced and trained in June, and execute in August 2018.

New teachers will meet with the principal over the summer in July (Dates to be determined).

<b>When will this action take place?</b>	<b>Action Needed to Achieve the Goal</b>	<b>Who will be participating in this?</b>	<b>How will this action be done and assessed?</b>	<b>Budget Needed to Support the Identified action</b>
To be done between 6/13/18 and 6/15/18	Pre-planning for 6/18, 6/19, and 6/20 training	Amanda Vang Kelly Thao Michelle Lee Vince	Agenda, Sign-in sheet, Training presentations and packets, Training Evaluation	\$720  (\$40/hr X 6 hours total X 3 Teachers)
6/18/18 6/19/18 6/20/18 Monday - Wednesday	Train all Core, HLD, and Movement Teachers from 3:00 – 5:00. Broken into three days of training:  Day 1: LG/LS – When to teach what and how? Rules and Procedures – When to teach what and how? Relationship and Community Building – What to teach and how? Class meetings  Day 2: Parts of the Brain Multiple Intelligences Growth Mindset  Day 3: Elements of Body-Brain Education	Core HLD Movement  (Training to be provided by Amanda, Kelly, Michelle, Vince)	Agenda, Sign in sheets, Presentation packets and trainings, evaluations	\$720  (\$40/hr X 2 hours x 3 Teachers)



When will this action take place?	Action Needed to Achieve the Goal	Who will be participating in this?	How will this action be done and assessed?	Budget Needed to Support the Identified action
Week of 6/18/18 and 6/25/18 Ongoing as needed	Check in with all teachers regarding training on Packing our Survival Kit. <ol style="list-style-type: none"> <li>1. Amanda Vang to check in with Ying, Rick, Mai, Caitlin, Claudia and Tracy</li> <li>2. Michelle Lee to check in with Kala, Vangdan, Katelyn, Richelle, Gina, and Felipe</li> <li>3. Kelly to check in with Alyssa, Pao, Steven, Dao, Mash, and Linh</li> <li>4. Vince and Julia to check in with HLD and Movement</li> </ol>	Core HLD Movement	Check in Google Form, Notes, Checklist, Observation and improvement in the areas identified, Reflection & Self-Evaluation	\$960  (\$40/hr X 8 Hours X 3 Teachers)
6/25/18 – 6/28/18  Monday - Thursday	All classroom teachers will create a HET environment that includes the following (To be done during the last week of school): <ol style="list-style-type: none"> <li>1. <b>Bulletin boards limited to two earth tone colors.</b></li> <li>2. Lighting includes use of <b>lamps</b> emit soft yellow, home feeling.</li> <li>3. Live plants distributed around the room (To be purchased later).</li> <li>4. Seats are arranged in learning clubs.</li> <li>5. <b>Agenda and YLT are posted</b> and shows what will be happening throughout the days and year.</li> <li>6. <b>LG/LS and Multiple Intelligences are posted</b> and intentionally referenced and taught.</li> <li>7. Classroom is clean, organized, and uncluttered.</li> <li>8. <b>Written procedures</b> are posted, taught, and referenced.</li> </ol>	Core HLD Movement	Check in Google Form, Notes, Checklist, Observation and improvement in the areas identified	\$5,250  (\$250 per classroom X 21 Classrooms)

When will this action take place?	Action Needed to Achieve the Goal	Who will be participating in this?	How will this action be done and assessed?	Budget Needed to Support the Identified action
6/25/18 – 6/28/18	Check in with all teachers regarding creating a HET environment. <ol style="list-style-type: none"> <li>1. Amanda Vang to check in with Ying, Rick, Mai, Caitlin, Claudia and Tracy</li> <li>2. Michelle Lee to check in with Kala, Vangdan, Katelyn, Richelle, Gina, and Felipe</li> <li>3. Kelly to check in with Alyssa, Pao, Steven, Dao, Mash, and Linh</li> <li>4. Vince and Julia to check in with HLD and Movement</li> </ol>	Core HLD Movement	Check in Google Form, Notes, Checklist, Observation and improvement in the areas identified, Reflection & Self-Evaluation	\$960  (\$40/hr X 8 Hours X 3 Teachers)
7/26/18 Thursday	Staff Meeting to go over YLT, expectations. Review of LG/LS, Rules and procedures, the HET Way by Design (9:00 – 4:00)	All staff members, Board Members, Academy Council Members	Agenda, Sign in sheets, Presentation packets and trainings, evaluations	\$3,522  (6 hours for: 6 HLD/Movement 3 Office Staff 2 Custodial Staff 4 Yard 6 Instructional Aides 13 Att Supervisors)
7/27/18 Friday	Train all support staff on items listed under Packing our Survival Kit (Provided by Vince). (9:00 – 12:00) <ol style="list-style-type: none"> <li>1. Lifelong Guidelines and LIFESKILLS</li> <li>2. Rules and Procedures</li> <li>3. Relationship and community Building</li> <li>4. Class Meetings</li> <li>5. Parts of the Brain</li> <li>6. Multiple Intelligences</li> <li>7. Growth Mindset</li> <li>8. Elements of Body Brain Education</li> </ol>	All Support Staff  (Training provided by Vince)	Agenda, Sign in sheets, Presentation packets and trainings, evaluations	\$1,221  (3 hours for: 3 Office Staff 2 Custodial Staff 4 Yard 6 Instructional Aides 13 Att Supervisors)

When will this action take place?	Action Needed to Achieve the Goal	Who will be participating in this?	How will this action be done and assessed?	Budget Needed to Support the Identified action
7/30/18 8/2/18 8/24/18 9/21/18 10/26/18 1/18/19 3/22/19	Check in and follow up with Support Staff regarding use of training and strategies (Provided by Vince). (9:00 – 12:00)	All Support Staff	Check in Google Form, Notes, Checklist, Observation and improvement in the areas identified, Reflection & Self-Evaluation	\$8,820  (3 hours for: 3 Office Staff 2 Custodial Staff 4 Yard 6 Instructional Aides 13 ATT Supervisors)

**Component Four: Exploring the Area**

Concept: Ownership

Care Package: Vince does a HET demo lesson

When will this action take place?	Action Needed to Achieve the Goal	Who will be participating in this?	How will this action be done and assessed?	Budget Needed to Support the Identified action
8/8/18 Wednesday	Training on Conceptual Planning and Thematic Curriculum Using the Elements of Body Brain Education (3:00 – 5:00) 1. HET lesson demonstration (8 steps lesson) – Vince 2. Create an observation checklist	Core	Agenda, Sign in sheets, Presentation packets and trainings, evaluations	\$240  (\$40/hr for 2 hours X 3 Teachers)
To be done between 8/10/18 – 8/16/18	Pre-planning for 8/17 training	Amanda Vang Kelly Thao Michelle Lee Vince	Agenda, Sign-in sheet, Training presentations and packets, Training Evaluation	\$720  (\$40/hr X 6 hours total X 3 Teachers)
8/17/18 Friday	Review curriculum planning template and YLT; core teachers to continue their work on developing their components through use of the curriculum planning template. Friday PD (9:00 – 4:00)	Core  (Training to be provided by Amanda, Kelly, Michelle, Vince)	Agenda, Sign in sheets, Presentation packets and trainings, evaluations	\$720  (\$40/hr for 6 hours X 3 Teachers)
8/20/18 Monday	Implementation of first Unit depending on grade level readiness	Core	Curriculum Map Check	No Budget Needed
Ongoing as needed	Check in with all teachers regarding training on Exploring the Area. 1. Amanda Vang to check in with Ying, Rick, Mai, Caitlin, Claudia and Tracy	Core	Check in Google Form, Notes, Checklist, Observation and improvement in the areas identified, Reflection & Self-Evaluation	\$960  (\$40/hr X 8 Hours X 3 Teachers)

When will this action take place?	Action Needed to Achieve the Goal	Who will be participating in this?	How will this action be done and assessed?	Budget Needed to Support the Identified action
	<ul style="list-style-type: none"> <li>2. Michelle Lee to check in with Kala, Vangdan, Katelyn, Richelle, Gina, and Felipe</li> <li>3. Kelly to check in with Alyssa, Pao, Steven, Dao, Mash, and Linh</li> </ul>			

**Component Five: Star Gazing**

Concept: Reflection

Care Package: Board Members to visit and support

When will this action take place?	Action Needed to Achieve the Goal	Who will be participating in this?	How will this action be done and assessed?	Budget Needed to Support the Identified action
9/14/18 Friday	Joy Raboli to train teachers on integrating all subjects and creating assessments to measure all subjects. (9:00 – 4:00 PD)	Core	Agenda, Sign-in sheet, Training presentations and packets, Training Evaluation	\$2,000 per day rate
9/19/18 Wednesday	Training on Conceptual Planning and Thematic Curriculum Continues, Day 1, (3:00 – 5:00) 1. Grade Level Teams to Present their implementation of the first unit, keepers, and polishers.	Core  (Support provided by Amanda, Kelly, Michelle, Vince)	Agenda, Sign in sheets, Presentation packets and trainings, evaluations	0
9/20/18 Thursday	Training on Conceptual Planning and Thematic Curriculum Continues, Day 2, (3:00 – 5:00) 2. Grade Level Teams to Present their implementation of the first unit, keepers, and polishers. 3. Grade level teams to continue their work on conceptual planning and working on grade level components	Core  (Support provided by Amanda, Kelly, Michelle, Vince)	Agenda, Sign in sheets, Presentation packets and trainings, evaluations	0
Ongoing as needed	Check in with all teachers regarding training on Star Gazing. 1. Amanda Vang to check in with Ying, Rick, Mai, Caitlin, Claudia and Tracy	Core	Check in Google Form, Notes, Checklist, Observation and improvement in the areas identified, Reflection & Self-Evaluation	\$960  (\$40/hr X 8 Hours X 3 Teachers)

When will this action take place?	Action Needed to Achieve the Goal	Who will be participating in this?	How will this action be done and assessed?	Budget Needed to Support the Identified action
	<ul style="list-style-type: none"> <li>2. Michelle Lee to check in with Kala, Vangdan, Katelyn, Richelle, Gina, and Felipe</li> <li>3. Kelly to check in with Alyssa, Pao, Steven, Dao, Mash, and Linh</li> </ul>			

**Component Six: Planning the Next Adventure**

Concept: Growth

Care Package: Celebrations of First Unit (photo album- immersion walls, activities, projects)

When will this action take place?	Action Needed to Achieve the Goal	Who will be participating in this?	How will this action be done and assessed?	Budget Needed to Support the Identified action
To be done between 10/5/18 – 10/12/18	Pre-planning for 10/19/18 training	Amanda Vang Kelly Thao Michelle Lee Vince	Agenda, Sign-in sheet, Training presentations and packets, Training Evaluation	\$720  (\$40/hr X 6 hours total X 3 Teachers)
10/4/18 Thursday	Training on Conceptual Planning and Thematic Curriculum Continues (3:00 – 5:00; may need more time)  1. Being-there experience – From Planning to Post Visit	Core  (Training to be provided by Vince)	Agenda, Sign in sheets, Presentation packets and trainings, training evaluations	0
10/18/18 Thursday	Training on Conceptual Planning and Thematic Curriculum Continues (3:00 – 5:00)  1. Review, Revise, modify, and refine curriculum maps based on grade level needs. 2. Create Slideshow and presentations for gallery walk to celebrate completion of curriculum map	Core	Agenda, Sign in sheets, Presentation packets and trainings, training evaluations	0
10/19/18 Friday	Training on Conceptual Planning and Thematic Curriculum Continues (9:00 – 4:00) 1. Grade level sharing of Unit 1 2. Reflection and Self-Evaluation	Core  (Training to be provided by	Agenda, Sign in sheets, Presentation packets and trainings, evaluations	\$720  (\$40/hr for 6 hours X 3 Teachers)



When will this action take place?	Action Needed to Achieve the Goal	Who will be participating in this?	How will this action be done and assessed?	Budget Needed to Support the Identified action
	3. Plan for unit 2.	Amanda, Kelly, Michelle, Vince)		
Ongoing as needed	Check in with all teachers regarding training on Planning the Next Adventure. <ol style="list-style-type: none"> <li>1. Amanda Vang to check in with Ying, Rick, Mai, Caitlin, Claudia and Tracy</li> <li>2. Michelle Lee to check in with Kala, Vangdan, Katelyn, Richelle, Gina, and Felipe</li> <li>3. Kelly to check in with Alyssa, Pao, Steven, Dao, Mash, and Linh</li> <li>4. Vince and Julia to check in with HLD and Movement</li> </ol>	Core	Check in Google Form, Notes, Checklist, Observation and improvement in the areas identified, Reflection & Self-Evaluation	\$960 (\$40/hr X 8 Hours X 3 Teachers)

**Component Seven: Lifelong Learning**

Concept: Progress

Care Package: Continuous Support from Amanda, Kelly, Michelle, and Vince

When will this action take place?	Action Needed to Achieve the Goal	Who will be participating in this?	How will this action be done and assessed?	Budget Needed to Support the Identified action
To be done between 10/19/18 – 10/31/18	Pre-planning for 11/1, 11/15, and 12/6	Amanda Vang Kelly Thao Michelle Lee Vince	Agenda, Sign-in sheet, Training presentations and packets, Training Evaluation	\$720  (\$40/hr X 6 hours total X 3 Teachers)
11/1/18 Thursday	Support with Conceptual Planning and Thematic Curriculum Continues (3:00 – 5:00)  <ol style="list-style-type: none"><li>1. Review, Revise, modify, and refine curriculum maps based on grade level needs.</li><li>2. Grade level teams share out progress of Unit 2 and Plans for Implementing Unit 3</li></ol>	Core	Agenda, Sign in sheets, Presentation packets and trainings, training evaluations	0
11/15/18 Thursday	Support with Conceptual Planning and Thematic Curriculum Continues (3:00 – 5:00)  <ol style="list-style-type: none"><li>1. Review of Unit 2 Keepers and Polishers – Share out by grade levels</li><li>2. Grade level report on Unit 3 Implementation</li></ol>	Core	Agenda, Sign in sheets, Presentation packets and trainings, training evaluations	0

When will this action take place?	Action Needed to Achieve the Goal	Who will be participating in this?	How will this action be done and assessed?	Budget Needed to Support the Identified action
12/6/18 Thursday	Joy Raboli visits to work with teachers on reviewing units 1 and working on Unit 2 – One hour per grade level during prep (8:00 – 3:00). From 3:00 – 5:00 meet with staff	Core	Agenda, Sign in sheets, Presentation packets and trainings, training evaluations	\$2,000 per day
12/7/8 Friday	Joy Raboli to work with teachers on conceptual planning / thematic curriculum, Units 3 and 4.	Core	Agenda, Sign in sheets, Presentation packets and trainings, training evaluations	\$2,000 per day
Ongoing as needed	Check in with all teachers regarding training on Planning the Next Adventure. 3. Amanda Vang to check in with Ying, Rick, Mai, Caitlin, Claudia and Tracy 4. Michelle Lee to check in with Kala, Vangdan, Katelyn, Richelle, Gina, and Felipe 5. Kelly to check in with Alyssa, Pao, Steven, Dao, Mash, and Linh 6. Vince and Julia to check in with HLD and Movement	Core	Check in Google Form, Notes, Checklist, Observation and improvement in the areas identified, Reflection & Self-Evaluation	\$960  (\$40/hr X 8 Hours X 3 Teachers)
To be done between 1//7/19 – 1/29/19	Pre-planning for 1/10, 1/14, 2/7	Amanda Vang Kelly Thao Michelle Lee Vince	Agenda, Sign-in sheet, Training presentations and packets, Training Evaluation	\$720  (\$40/hr X 6 hours total X 3 Teachers)
1/10/19 Thursday	Support with Conceptual Planning and Thematic Curriculum Continues (3:00 – 5:00)  1. Review, Revise, modify, and refine curriculum maps based on grade level needs.	Core	Agenda, Sign in sheets, Presentation packets and trainings, training evaluations	0

When will this action take place?	Action Needed to Achieve the Goal	Who will be participating in this?	How will this action be done and assessed?	Budget Needed to Support the Identified action
	2. Grade level teams share out progress of Unit 3 and Plans for Implementing Unit 4			
1/24/19 Thursday	Support with Conceptual Planning and Thematic Curriculum Continues (3:00 – 5:00)  1. Review of Unit 3 Keepers and Polishers – Share out by grade levels. 2. Immersion Wall	Core	Agenda, Sign in sheets, Presentation packets and trainings, training evaluations	0
2/7/19 Thursday	Support with Conceptual Planning and Thematic Curriculum Continues (3:00 – 5:00) 1. Grade level teams share out/gallery walk & Celebration of Unit 3 2. Social Action Projects	Core	Agenda, Sign in sheets, Presentation packets and trainings, training evaluations	0
2/21/19 Thursday	Support with Conceptual Planning and Thematic Curriculum Continues (3:00 – 5:00)	Core	Agenda, Sign in sheets, Presentation packets and trainings, training evaluations	0
3/18/19 Monday	Joy Raboli visits to work with teachers on reviewing units 3 /4 – One hour per grade level during prep (8:00 – 3:00). From 3:00 – 5:00 meet with staff	Core	Agenda, Sign in sheets, Presentation packets and trainings, training evaluations	\$2,000 per day

When will this action take place?	Action Needed to Achieve the Goal	Who will be participating in this?	How will this action be done and assessed?	Budget Needed to Support the Identified action
3/21/19 Thursday	Support with Conceptual Planning and Thematic Curriculum Continues (3:00 – 5:00)	Core	Agenda, Sign in sheets, Presentation packets and trainings, training evaluations	0
4/4/19 Thursday	Support with Conceptual Planning and Thematic Curriculum Continues (3:00 – 5:00)	Core	Agenda, Sign in sheets, Presentation packets and trainings, training evaluations	0
5/2/19 Thursday	Support with Conceptual Planning and Thematic Curriculum Continues (3:00 – 5:00)	Core	Agenda, Sign in sheets, Presentation packets and trainings, training evaluations	0
5/16/19 Thursday	Support with Conceptual Planning and Thematic Curriculum Continues (3:00 – 5:00)	Core	Agenda, Sign in sheets, Presentation packets and trainings, training evaluations	0
6/6/19 Thursday	Support with Conceptual Planning and Thematic Curriculum Continues (3:00 – 5:00)	Core	Agenda, Sign in sheets, Presentation packets and trainings, training evaluations	0
6/10/19 Monday	Joy Raboli visits to work with teachers on reviewing YLT, all units, and revise if needed. One hour per grade level during prep (8:00 – 3:00). From 3:00 – 5:00 meet with staff	Core	Agenda, Sign in sheets, Presentation packets and trainings, training evaluations	\$2,000 per day

When will this action take place?	Action Needed to Achieve the Goal	Who will be participating in this?	How will this action be done and assessed?	Budget Needed to Support the Identified action
Ongoing as needed	Check in with all teachers regarding training on Planning the Next Adventure. <ol style="list-style-type: none"> <li>3. Amanda Vang to check in with Ying, Rick, Mai, Caitlin, Claudia and Tracy</li> <li>4. Michelle Lee to check in with Kala, Vangdan, Katelyn, Richelle, Gina, and Felipe</li> <li>5. Kelly to check in with Alyssa, Pao, Steven, Dao, Mash, and Linh</li> <li>6. Vince and Julia to check in with HLD and Movement</li> </ol>	Core	Check in Google Form, Notes, Checklist, Observation and improvement in the areas identified, Reflection & Self-Evaluation	\$960 (\$40/hr X 8 Hours X 3 Teachers)

**Other Items to Support Implementation of this Plan**

<b>When will this action take place?</b>	<b>Action Needed to Achieve the Goal</b>	<b>Who will be participating in this?</b>	<b>How will this action be done and assessed?</b>	<b>Budget Needed to Support the Identified action</b>
5/29/18 Ongoing	Consultation, mentorship, and coaching from Joy Raboli, Principal at Sherwood Charter	Design Team Principal Core HLD Movement Support Staff	Agenda, Minutes, Sign in sheets, Presentation packets and trainings, evaluations	\$2,500
9/16/18 – 9/19/18	Second Visit to Sherwood to see planning and teaching in action for three days	Three Teachers Principal	Flight, Lodging, handouts, packets, presentations back to staff	\$3,160
Date to be Determined	Travel expenses, food, lodging, rentals	Three Teachers Principal Sherwood Principal and/or one lead teacher from Sherwood	Flight, Lodging, receipts, handouts, packets, presentations back to staff	\$13,680

Alongside with the implementation of this plan, the collaborative inquiry process will take place during each grade level's prep/collaboration time and will be calendared in where the principal can support each grade level team. The will enable the principal to collaborate with each grade level at least twice a month. This is to include HLD and Movement collaboration, which will take place between 7:00 – 8:00 am.

The 8-Step lesson plan delivery process will continue, along with lesson-studies and co-teaching.