



High School Transformation Guidebook
Transformation Planning Tool



Components of the Guidebook

- **High School Transformation Guidebook:** Core guidebook providing an overview of Green Dot's recommended approach to high school transformation, including an introduction and detailed chapters organized around 8 transformation principles
- **Appendix Toolkit:** Additional tools and resources (e.g., templates, reference documents, samples) to provide deeper content and support implementation
- **Executive Summary:** Introduction and framing pages from each of the 8 chapters of the Guidebook to provide a high level look at Green Dot's transformation model and outline key transformation decisions and actions
- **Transformation Planning Tool:** List of priority action items in the planning year of a transformation, critical school and cluster-level hires, and budgeting tools to support implementation planning and project management

Contents of the Planning Tool

- **Priority Actions:** List of critical planning actions for transformation preparation
- **Transformation Hiring Grid:** List of school-level and cluster-level hires required by transformation
- **Home Office Guidebook Reference:** List of relevant sections of the High School Transformation Guidebook for Home Office staff
- **Budget planning tools:** P&L predictor tool to forecast revenues and expenses, detailed descriptions of expected upfront and ongoing costs and a guide to transformation funding sources

Priority Actions: 24 to 9 months before school opening

-  Bottleneck / critical timing
-  Suggested timing

<u>Key Action</u>	<u>Timing / Flexibility of timing</u>	<u>Lead</u>	<u>Description of Actions and Dependencies / Rationale</u>
<i>Develop leadership pipeline & identify candidates for future transformations</i>	<ul style="list-style-type: none"> • 24 months before proposed start of year 	<ul style="list-style-type: none"> • Human Capital (<i>Principle 3</i>) 	<ul style="list-style-type: none"> • Need 6-15 administrators with a full year in AIR program before taking on transformation • Need to discuss career progression and prepare identified Ps and APs that are candidates for transformation
<i>Identify the school & begin organizing</i>	<ul style="list-style-type: none"> • 18-20 months before proposed start of year 	<ul style="list-style-type: none"> • Community Engagement (<i>Principle 1</i>) 	<ul style="list-style-type: none"> • Need 6-9 months before submitting the charter petition to build support through one-on-ones, house meetings, community meetings and meetings with key leaders
<i>Identify fundraising sources</i>	<ul style="list-style-type: none"> • 18-20 months before proposed start of year 	<ul style="list-style-type: none"> • Development (<i>Principle 8</i>) 	<ul style="list-style-type: none"> • Need time to identify foundations and sources of funding to cover gaps and to build relationships • Want to ensure deadlines for submission aren't missed; will need funding to cover upfront costs before revenue comes in
<i>Identify leadership and plan for succession</i>	<ul style="list-style-type: none"> • ~15 months before start of year 	<ul style="list-style-type: none"> • Human Capital (<i>Principle 3</i>) 	<ul style="list-style-type: none"> • Cluster leaders (CD and CBM and/or interim supports if they are unavailable) are early decision makers for the transformations • A transition and succession plan (when they will be available, who will take their places, etc.) is needed to give principals and their schools time to prepare
<i>Develop and submit charter petition</i>	<ul style="list-style-type: none"> • ~12-15 months before start of year (submit in Sept. Year 0) 	<ul style="list-style-type: none"> • Public Affairs (<i>Principle 1</i>) 	<ul style="list-style-type: none"> • Can take 3 months to approve (requires GD Board approval beforehand) and is critical bottleneck to moving forward with any permanent transformation decisions and actions (agreements, staffing, recruiting, etc.)
<i>Hire first principal</i>	<ul style="list-style-type: none"> • Dec, Year 0 	<ul style="list-style-type: none"> • Human Capital (<i>Principle 3</i>) 	<ul style="list-style-type: none"> • Lead principal needed to begin making school-level decisions

Priority Actions: Jan – March of Year 0

- Bottleneck / critical timing
- Suggested timing

<u>Key Action</u>	<u>Timing / Flexibility of timing</u>	<u>Lead</u>	<u>Description of Actions and Dependencies / Rationale</u>
Obtain CDS codes, LEAs, WASC accreditation	• Jan ●	• Public Affairs <i>(Principle 1)</i>	<ul style="list-style-type: none"> • Can take up to 2 months after approval • Needed for contracting vendors, testing, etc.
Create punch-list of key negotiation items	• Jan ●	• Public Affairs <i>(Principle 1)</i>	<ul style="list-style-type: none"> • Should be developed before engaging the district in negotiations
Develop Facilities Use Agreement	• Jan ●	• Public Affairs <i>(Principle 1)</i>	<ul style="list-style-type: none"> • Will take ~60 days; bottleneck for renovating the facility, establishing a physical presence
Hire additional principals	• Jan ●	• Cluster Director <i>(Principle 3)</i>	<ul style="list-style-type: none"> • Needed to make school decisions, interface with community, recruit students
Obtain feeder school disks	• Jan ●	• Principals (Pub Affairs and KM) <i>(Principle 2)</i>	<ul style="list-style-type: none"> • Needed for recruiting, mailings and outreach, program development and staffing
Obtain existing data on 10th-12th graders	• Jan ●	• Public Affairs <i>(Principle 2)</i>	<ul style="list-style-type: none"> • May take a while to actually obtain the data • Needed to develop programs
Begin recruiting at feeder schools	• Jan ●	• Community Engagement <i>(Principle 2)</i>	<ul style="list-style-type: none"> • Need to get in front of parents before enrollment decisions are made (district permit process, magnet schools, etc.)
Hire recruiter for teachers and admins	• Jan ●	• Human Capital <i>(Principle 3)</i>	<ul style="list-style-type: none"> • Need a pool of ~2,000 candidates for 25-30 ultimate hires; must begin interviewing in Feb
Provide input into district team assembly	• Jan ●	• Public Affairs <i>(Principle 1)</i>	<ul style="list-style-type: none"> • Green Dot must provide input into the team assembly (e.g., the district layer or project manager assigned to Green Dot) before decisions are made
Hire Security Coordinator	• Feb ●	• Director of Security <i>(Principle 5)</i>	<ul style="list-style-type: none"> • Needed to assess campus, observe existing security team, hire security vendor, and lead training 30 days before Bridge
Hire Coordinator of Afterschool Programs and Athletics	• Feb ●	• Operations team <i>(Principle 5)</i>	<ul style="list-style-type: none"> • Needed to identify funding tied to old structure, ⁵ engage students for Fall athletics before the end of the year, and hire coaches

Priority Actions: Jan – March of Year 0 (cont.)

● Bottleneck / critical timing
● Suggested timing


<u>Key Action</u>	<u>Timing / Flexibility of timing</u>		<u>Lead</u>	<u>Description of Actions and Dependencies / Rationale</u>
<i>Establish a physical presence on campus</i>	<ul style="list-style-type: none"> As soon as possible after access is granted (likely March) 	●	<ul style="list-style-type: none"> Public Affairs (<i>Principle 2</i>) 	<ul style="list-style-type: none"> Needed to pulse-check campus, answer questions of students, parents and teachers, collect enrollment forms, etc.
<i>Outline program and facility needs and assess site</i>	<ul style="list-style-type: none"> As soon as possible after access is granted (likely March/April) 	●	<ul style="list-style-type: none"> Facilities, IT, Real Estate (<i>Principle 4</i>) 	<ul style="list-style-type: none"> Must identify repairs and renovations for district negotiations Campus structure and layout will have financial and programmatic implications
<i>Hire SPED administrator</i>	<ul style="list-style-type: none"> March 	●	<ul style="list-style-type: none"> Ed team (<i>Principle 6</i>) 	<ul style="list-style-type: none"> Ensures IEPs are in compliance Needed for program development
<i>Hire ELL specialist</i>	<ul style="list-style-type: none"> March 	●	<ul style="list-style-type: none"> Ed team (<i>Principle 6</i>) 	<ul style="list-style-type: none"> Needed for program development
<i>Hire counselors (or interim support)</i>	<ul style="list-style-type: none"> March 	●	<ul style="list-style-type: none"> Director of Counseling (<i>Principle 6</i>) 	<ul style="list-style-type: none"> Needed to conduct transcript review beginning in March and to develop master schedule
<i>Conduct transcript review</i>	<ul style="list-style-type: none"> March 	●	<ul style="list-style-type: none"> Counselors (<i>Principle 6</i>) 	<ul style="list-style-type: none"> Will determine program and staffing needs
<i>Plan Summer Bridge</i>	<ul style="list-style-type: none"> March 	●	<ul style="list-style-type: none"> Principals (<i>Principle 2, 6</i>) 	<ul style="list-style-type: none"> Needed for funding, enrollment, staffing decisions and planning Safe and Civil trainings

Priority Actions: April to Sept (start of year)

- Bottleneck / critical timing
- Suggested timing


<u>Key Action</u>	<u>Timing</u>	<u>Flexibility of timing</u>	<u>Lead</u>	<u>Description of Actions and Dependencies / Rationale</u>
<i>Develop detailed enrollment projections</i>	• April	●	• CBM (<i>Principle 4</i>)	• Will determine number of schools needed, staffing requirements, budget implications, etc.
<i>Develop school and cluster budgets</i>	• April	●	• Principals, F&A (<i>Principle 8</i>)	• Must identify fundraising gap and seek Board approval; will be iterative process that takes time
<i>Develop master schedule</i>	• April	●	• Director of counseling (<i>Principle 6</i>)	• Schools and shared programs will need to align around schedule (e.g., athletic calendar)
<i>Hire office manager, dept. heads, APs, and deans</i>	• May / June	●	• Cluster Director (<i>Principle 3</i>)	• Need to prepare them before the start of the year
<i>Conduct staff trainings for Bridge</i>	• June	●	• Ed team (<i>Principle 3</i>)	• Need to align team before Bridge
<i>Set targets for Year 1 performance</i>	• June	●	• Knowledge Management (<i>Principle 7</i>)	• Helps structure professional development and performance measurement across the cluster
<i>Clean facility and ensure checklists are met</i>	• June	●	• Operations (<i>Principle 4</i>)	• Part of campus must be ready for Summer Bridge; will take time to prepare
<i>Allocate space and assets and outline process for shared space</i>	• June	●	• Cluster Director (<i>Principle 4</i>)	• Schools need time to tailor and prepare their campuses and to conduct additional repairs
<i>Establish the Cluster Governance Committee</i>	• June	●	• Cluster Director (<i>Principle 4</i>)	• Will make cluster-level decisions before the start of the year
<i>Conduct diagnostic testing for 9th graders</i>	• July	●	• Principals (<i>Principle 6</i>)	• Program, intervention and staffing refinements depend on results
<i>Conduct full staff trainings</i>	• August	●	• Ed team (<i>Principle 3</i>)	• Staff must be aligned going into the year

Transformation Hiring Grid: School level staff

 Hire 6 months in advance if budget permits

	<u>2 Schools</u>	<u>3 Schools</u>	<u>4 Schools</u>	<u>5 Schools</u>	<u>Assumption</u>
Students	~1,200	~1,700	~2,220	~2,700	
<u>School level Certificated staff</u>					
• Principals	2	3	4	5	1 x school
• Assistant Principals	4	6	8	10	2 x school
• Deans	2	3	4	5	1 x school
• Teachers (non-SPED)	~55	~80	~105	~130	19 students / teacher
• Teachers (SPED*)	~12	~17	~22	~27	10 students / teacher
• SPED Aides	~12	~17	~22	~27	1 x SPED teacher
• Counselors	4	6	8	10	2 x school
• Psychologists	1	2	2	3	1 x 1,000 students
• Literacy Specialists	1	2	2	3	0.5 x school
• Math Specialists	1	2	2	3	0.5 x school
<u>School level Classified staff</u>					
• Campus security aides	6	9	12	15	3 x school
• Office manager	2	3	4	5	1 x school
• Office assistant	2	3	4	5	1 x school
• Parent coordinator	2	3	4	5	1 x school
• Bilingual aides	2	3	4	5	1 x school

Transformation Hiring Grid: Cluster level staff

 Positions already exist at the Home Office and do not require new hires, individuals are allocated to transformation planning for a period and then phased down

Position	When to hire
•Cluster Director	Fall Year 0
•Cluster Business Manager	Fall Year 0
•SPED Program Administrator	6 months before opening
•Coordinator of Afterschool Programs and Athletics	6 months before opening
•ELL Specialist	6 months before opening
•Security Coordinator	6 months before opening
•Security vendor	3 months before opening
•Clinical supervisor	3 months before opening
•Behavioral Specialist	3 months before opening
•School Resource Deputy	1 month before opening

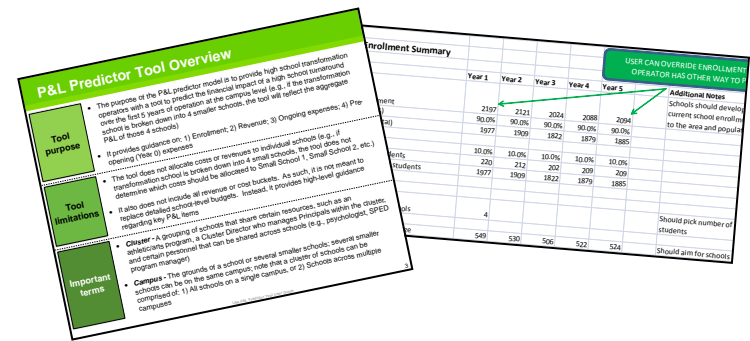
Home Office Guidebook Reference: Relevant sections for Home Office staff

<u>Home Office Staff</u>	1. Successful Transition	2. Early Presence	3. High Performing Teams	4. Cluster of Small Schools	5. New School Climate	6. Portfolio of Interventions	7. Measuring Success	8. Effective Budgeting
• Executive Team	✓							✓
• Community Engagement	✓	✓			✓			
• Communications	✓	✓						
• Development								✓
• Public Affairs	✓			✓	✓	✓		
• Strategic Planning				✓				
• Education Team	✓	✓	✓	✓	✓	✓	✓	✓
• Human Capital			✓		✓			
• Operations Team	✓	✓	✓	✓	✓	✓	✓	✓
• Knowledge Management					✓	✓	✓	
• Finance and Accounting	✓				✓			

Budget planning tools

- Transformation P&L predictor:

- Detailed user guide
- Excel model to forecast P&L



- Key transformation cost drivers:

Description of major pre-opening and ongoing costs involved in high school transformation

Pre-opening costs – Personnel

Expense	% of Year 0 costs	Budgeting assumptions*	Additional Note
Principal	9-10%	• 1 hired per school • Hired 6 months before Day 1	• Might need to offer higher salary to attract appropriate administrators for turnaround
Assistant Principal	10-15%	• 2 AP's per school • Hired 6 months before Day 1	• Might need to offer higher salary to attract appropriate administrators for turnaround
Coaches	3-5%	• 2 Coaches per school • Hired 6 months before Day 1	• Should have at least 1 coach per school to review academics and transcripts; can be fine initially due to accelerated timeline
SPED Program Manager	<1%	• 1 SPED Program Manager can be shared across cluster of schools • Hired 6 months before Day 1	• Much greater acquisition of high need students requires more robust SPED program
SPED Specialist	<1%	• 1 SPED specialist per 2,000 students • Hired 2 months before Day 1	• SPED specialists will assist SPED Program Manager with SPED file assessment
Office Manager	<1%	• 1 Office Manager per school • Hired 3 months before Day 1	• May choose to hire additional office manager across cluster of schools

Note: List includes only most significant drivers and is not exhaustive. Refer to "P&L predictor tool" in appendix for a more detailed revenue/cost breakdown tool also helps predict 5-year transformation P&L.

*Note: Budgeting assumptions reflect assumptions in line state with sufficient budget, depending on actual budget, operator may be forced to operate in budget categories (e.g., 1 AP per school/assistant 2 AP per school).

- Transformation funding: Overview of fundraising sources for transformation

Major sources of fundraising for transformations

	Public	Foundations	Corporations	HNWY's
Description:	• Federal and state grants in addition to public per-pupil funding	• Non-profit or private organizations that donate funds to support other organizations	• Business contributions to education through Corporate Giving	• High net worth individual HNWY's contribute to education through philanthropic donations to education
Transformation specific sources and reasons:	<ul style="list-style-type: none"> • School Improvement Grants (SIG) - SIG grants are provided to least achieving schools • If grants - Competitive grants grant for variety of education-related priorities; must include research partner • Transformation operations should consider impact of CDE code on funding since certain grants require del CDE code (e.g., SIG, CDEU) while others are tied to a new code (e.g., HCSIP) 	<ul style="list-style-type: none"> • None specifically related to transformations • However, development team should reach out to foundations to inquire about contributing to transformations • Many foundations are interested in contributing to transformations • Foundations should be engaged as early as possible to ensure sufficient cash in Year 0 	<ul style="list-style-type: none"> • None specifically related to transformations • Development team should reach out to CDE's to discuss communication strategy and communication log 	<ul style="list-style-type: none"> • Should develop database and pipeline of potential donors, including detailed communication strategy and communication log

Tools are located in the Appendix Toolkit, Principle 8: Effective Budgeting