Green Dot Public schools™

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

Key Action	Timing / Flexibility of timing		Lead	Description of Actions and Dependencies / Rationale
Develop leadership pipeline & identify candidates for future transformations	• 24 months before proposed start of year	🟡	• Human Capital *(Principle 3)*	• 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
Identify the school & begin organizing	• 18-20 months before proposed start of year	🟡	• Community Engagement *(Principle 1)*	• 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
Identify fundraising sources	• 18-20 months before proposed start of year	🟡	• Development *(Principle 8)*	• 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
Identify leadership and plan for succession	• ~15 months before start of year	🟡	• Human Capital *(Principle 3)*	• 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
Develop and submit charter petition	• ~12-15 months before start of year (submit in Sept. Year 0)	🔴	• Public Affairs *(Principle 1)*	• 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.)
Hire first principal	• Dec, Year 0	🟡	• Human Capital *(Principle 3)*	• Lead principal needed to begin making school-level decisions

Priority Actions: Jan – March of Year 0

🔴 Bottleneck / critical timing
🟡 Suggested timing

Key Action	Timing / Flexibility of timing		Lead	Description of Actions and Dependencies / Rationale
Obtain CDS codes, LEAs, WASC accreditation	• Jan	🔴	• Public Affairs *(Principle 1)*	• Can take up to 2 months after approval • Needed for contracting vendors, testing, etc.
Create punch-list of key negotiation items	• Jan	🟡	• Public Affairs *(Principle 1)*	• Should be developed before engaging the district in negotiations
Develop Facilities Use Agreement	• Jan	🟡	• Public Affairs *(Principle 1)*	• Will take ~60 days; bottleneck for renovating the facility, establishing a physical presence
Hire additional principals	• Jan	🟡	• Cluster Director *(Principle 3)*	• Needed to make school decisions, interface with community, recruit students
Obtain feeder school disks	• Jan	🔴	• Principals (Pub Affairs and KM) *(Principle 2)*	• Needed for recruiting, mailings and outreach, program development and staffing
Obtain existing data on 10th-12th graders	• Jan	🟡	• Public Affairs *(Principle 2)*	• May take a while to actually obtain the data • Needed to develop programs
Begin recruiting at feeder schools	• Jan	🟡	• Community Engagement *(Principle 2)*	• 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 *(Principle 3)*	• 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 *(Principle 1)*	• 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 *(Principle 5)*	• 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 *(Principle 5)*	• Needed to identify funding tied to old structure, engage students for Fall athletics before the end of the year, and hire coaches

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🔴 Bottleneck / critical timing
🟡 Suggested timing

Key Action	Timing / Flexibility of timing		Lead	Description of Actions and Dependencies / Rationale
Establish a physical presence on campus	• As soon as possible after access is granted (likely March)	🟡	• Public Affairs *(Principle 2)*	• Needed to pulse-check campus, answer questions of students, parents and teachers, collect enrollment forms, etc.
Outline program and facility needs and assess site	• As soon as possible after access is granted (likely March/April)	🟡	• Facilities, IT, Real Estate *(Principle 4)*	• Must identify repairs and renovations for district negotiations • Campus structure and layout will have financial and programmatic implications
Hire SPED administrator	• March	🔴	• Ed team *(Principle 6)*	• Ensures IEPs are in compliance • Needed for program development
Hire ELL specialist	• March	🟡	• Ed team *(Principle 6)*	• Needed for program development
Hire counselors (or interim support)	• March	🔴	• Director of Counseling *(Principle 6)*	• Needed to conduct transcript review beginning in March and to develop master schedule
Conduct transcript review	• March	🟡	• Counselors *(Principle 6)*	• Will determine program and staffing needs
Plan Summer Bridge	• March	🟡	• Principals *(Principle 2, 6)*	• Needed for funding, enrollment, staffing decisions and planning Safe and Civil trainings

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Priority Actions: April to Sept (start of year)

🔴 Bottleneck / critical timing
🟡 Suggested timing

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

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Transformation Hiring Grid: School level staff

	2 Schools	3 Schools	4 Schools	5 Schools	Assumption
Students	~1,200	~1,700	~2,220	~2,700	
School level Certificated staff					
• 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
School level Classified staff					
• 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

*Assumes 10% of students are SPED

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

Home Office Staff	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

- <u>Transformation P&L predictor</u>:
  - Detailed user guide
  - Excel model to forecast P&L
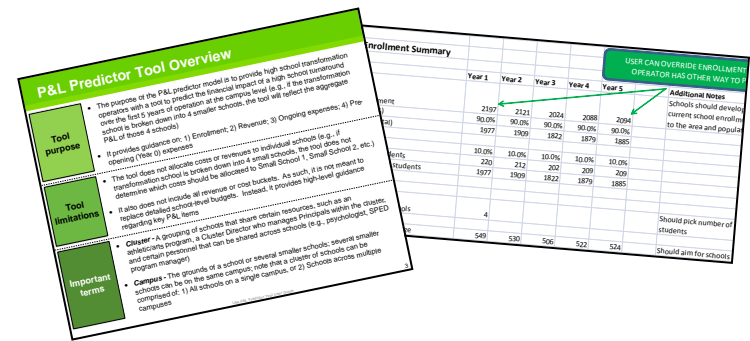
- <u>Key transformation cost drivers</u>: Description of major pre-opening and ongoing costs involved in high school transformation

- <u>Transformation funding</u>: Overview of fundraising sources for transformation

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