



## Sage Oak Charter Schools

### Board of Directors Study Session

Published on August 8, 2025 at 1:25 PM PDT

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#### Date and Time

Thursday August 14, 2025 at 11:25 AM PDT

#### Location

##### Sage Oak Charter Schools

1473 Ford Street, Suite #105  
Redlands, CA 92373

##### Regus- Gateway Chula Vista

333 H Street, Suite 5000  
Chula Vista, CA 91910

#### [Join Zoom Meeting](#)

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#### MISSION STATEMENT

Educating students through a personalized and collaborative learning approach, empowering them to lead purposeful and productive lives.

**THE ORDER OF BUSINESS MAY BE CHANGED WITHOUT NOTICE**

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Notice is hereby given that the order of consideration of matters on this agenda may be changed without prior notice.

**REASONABLE LIMITATIONS MAY BE PLACED ON PUBLIC TESTIMONY**

The Governing Board’s presiding officer reserves the right to impose reasonable time limits on public testimony to ensure that the agenda is completed.

**REASONABLE ACCOMMODATION WILL BE PROVIDED FOR ANY INDIVIDUAL WITH A DISABILITY**

Pursuant to the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990, any individual with a disability who requires reasonable accommodation to attend or participate in this meeting of the Governing Board may request assistance by contacting Sage Oak Charter Schools.

**Agenda**

	Purpose	Presenter	Time
<b>I. Opening Items</b>			<b>11:25 AM</b>
<b>A.</b> Call the Meeting to Order		Board President	1 m
<b>B.</b> Record Attendance		Board President	1 m
Roll Call:			
William Hall, President			
Michael Humphrey, Vice President			
Steve Fraire, Clerk			
Susan Houle, Member			
Peter Matz, Member			
<b>II. Pledge of Allegiance</b>			<b>11:27 AM</b>
<b>A.</b> Led by Board President or designee		Board President	1 m
<b>III. Approve/Adopt Agenda</b>			<b>11:28 AM</b>
<b>A.</b> (Action) Approval of Agenda for August 14, 2025 Board of Directors Study Session	Vote	Board President	1 m
It is recommended the Board approve the agenda for the August 14, 2025, Board of Directors Study Session as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).			

	Purpose	Presenter	Time
Roll Call Vote:			
William Hall			
Michael Humphrey			
Steve Fraire			
Susan Houle			
Peter Matz			
Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____			

**IV. Approve Minutes** **11:29 AM**

- |           |   |                    |                 |     |
|-----------|---|--------------------|-----------------|-----|
| <b>A.</b> | (Action) Approval of Minutes for June 12, 2025<br>Regular Meeting of the Board of Directors | Approve<br>Minutes | Board President | 1 m |
|-----------|---|--------------------|-----------------|-----|

It is recommended the Board approve the minutes from the June 12, 2025, Regular Meeting of the Board of Directors as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

Roll Call Vote:  
William Hall  
Michael Humphrey  
Steve Fraire  
Susan Houle  
Peter Matz  
Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Ayes \_\_\_\_\_ Nays \_\_\_\_\_ Absent \_\_\_\_\_

- |           |   |                    |                 |     |
|-----------|---|--------------------|-----------------|-----|
| <b>B.</b> | (Action) Approval of Minutes for June 18, 2025<br>Regular Meeting of the Board of Directors | Approve<br>Minutes | Board President | 1 m |
|-----------|---|--------------------|-----------------|-----|

It is recommended the Board approve the minutes from the June 18, 2025, Regular Meeting of the Board of Directors as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

Roll Call Vote:  
William Hall  
Michael Humphrey  
Steve Fraire  
Susan Houle

	Purpose	Presenter	Time
Peter Matz			
Moved by _____	Seconded by _____	Ayes _____	Nays _____ Absent _____

## V. Public Comment - Closed Session

The public has a right to comment on any items of the Closed Session agenda. Members of the public will be permitted to comment on any other item within the Board's jurisdiction under the section Public Comments/Recognition/Reports.

## VI. Adjourn to Closed Session

11:31 AM

- |    |  |      |                 |     |
|----|--|------|-----------------|-----|
| A. | The Board Will Consider and May Act on Any of the Closed Session Matters | Vote | Board President | 1 m |
|----|--|------|-----------------|-----|

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Peter Matz

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Ayes \_\_\_\_\_ Nays \_\_\_\_\_ Absent \_\_\_\_\_

## VII. Closed Session

11:32 AM

- |    |                       |  |  |      |
|----|-----------------------|--|--|------|
| A. | Closed Session Agenda |  |  | 10 m |
|----|-----------------------|--|--|------|

### 1. Public Employee Appointment

(Gov. Code section 54957(b)(1).)

Title: *Superintendent Designee*

## VIII. Reconvene Regular Meeting

11:42 AM

- |    |   |                 |     |
|----|---|-----------------|-----|
| A. | Report Out Any Action Taken in Closed Session | Board President | 1 m |
|----|---|-----------------|-----|

## IX. Public Comments/Recognition/Reports

Please submit a Request to Speak to the Board of Directors using the chat feature on the right-hand side of the Zoom platform. Please state the agenda item number that you wish to address prior to the agenda item being called by the Board President. Not more than three (3) minutes are to be allotted to any one (1) speaker, and no more than twenty (20)



	Purpose	Presenter	Time
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minutes on the same subject. This portion of the agenda is for comments, recognitions, and reports to the Board and is not intended to be a question-and-answer period. If you have questions for the Board, please provide the Board President with a written statement, and an administrator will provide answers at a later date.

<b>X.</b>	<b>Human Resources</b>		<b>11:43 AM</b>
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- |           |  |      |                  |     |
|-----------|--|------|------------------|-----|
| <b>A.</b> | (Action) Approval of 2025-26 Superintendent/CEO Evaluation Timeline and Plan | Vote | Krista Woodgrift | 1 m |
|-----------|--|------|------------------|-----|

It is recommended the Board approve the 2025-26 Superintendent/CEO Evaluation Timeline and Plan as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

**Fiscal Impact:** N/A

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Peter Matz

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Ayes \_\_\_\_\_ Nays \_\_\_\_\_ Absent \_\_\_\_\_

<b>XI.</b>	<b>Oral Presentations</b>		<b>11:44 AM</b>
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- |           |   |  |                  |      |
|-----------|---|--|------------------|------|
| <b>A.</b> | Annual Board of Directors' Self-Evaluation            |  | Board President  | 10 m |
| <b>B.</b> | Sage Oak Charter Schools Strategic Plan 2025-26       |  | Krista Woodgrift | 20 m |
| <b>C.</b> | AI Master Plan  |  | Brad Bookser     | 30 m |
|           | Brad Bookser, Director of Information Technology      |  |                  |      |
|           | Traci King, Director of Secondary Education/Principal |  |                  |      |

<b>XII.</b>	<b>Calendar</b>		
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The next scheduled meeting will be a Regular Meeting of the Board of Directors held on September 11, 2025.

	Purpose	Presenter	Time
<b>XIII. Closing Items</b>			<b>12:44 PM</b>
<b>A. Adjourn Meeting</b>	Vote	Board President	1 m
Roll Call Vote:			
William Hall			
Michael Humphrey			
Steve Fraire			
Susan Houle			
Peter Matz			
Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____			

FOR MORE INFORMATION

For more information concerning this agenda, contact  
Sage Oak Charter Schools.

# Coversheet

## (Action) Approval of Minutes for June 12, 2025 Regular Meeting of the Board of Directors

<b>Section:</b>	IV. Approve Minutes
<b>Item:</b>	A. (Action) Approval of Minutes for June 12, 2025 Regular Meeting of the
Board of Directors	
<b>Purpose:</b>	Approve Minutes
<b>Submitted by:</b>	
<b>Related Material:</b>	Minutes for Regular Meeting of the Board of Directors on June 12, 2025

DRAFT

SAGE OAK  
CHARTER SCHOOLS



## Sage Oak Charter Schools

### Minutes

#### Regular Meeting of the Board of Directors

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##### **Date and Time**

Thursday June 12, 2025 at 9:00 AM

##### **Location**

##### **Sage Oak Charter Schools**

1473 Ford Street, Suite #105

Redlands, CA 92373

##### **Regus- Gateway Chula Vista**

333 H Street, Suite 5000

Chula Vista, CA 91910

##### **[Join Zoom Meeting](#)**

ID: 91736013228

Passcode: 679101

##### **[\(US\) +1 301-715-8592](#)**

Passcode: 679101

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### **Directors Present**

M. Humphrey, P. Matz, S. Fraire, S. Houle, W. Hall

### **Directors Absent**

*None*

### **Guests Present**

B. Bookser, C. Coffey, E. Horta, K. Woodgrift, L. Snee, T. O'Brien

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## **I. Opening Items**

### **A. Call the Meeting to Order**

W. Hall called a meeting of the board of directors of Sage Oak Charter Schools to order on Thursday Jun 12, 2025 at 9:00 AM.

### **B. Record Attendance**

## **II. Pledge of Allegiance**

### **A. Led by Board President or designee**

W. Hall, Board President, led the meeting in the Pledge of Allegiance.

## **III. Approve/Adopt Agenda**

### **A. (Action) Approval of Agenda for June 12, 2025 Regular Meeting of the Board of Directors**

M. Humphrey made a motion to W. Hall, Board President, to approve the agenda as presented for the June 12, 2025, Regular Meeting of the Board of Directors.

S. Houle seconded the motion.

The board **VOTED** unanimously to approve the motion.

#### IV. Approve Minutes

##### A. (Action) Approval of Minutes for May 8, 2025 Regular Meeting of the Board of Directors

P. Matz made a motion to W. Hall, Board President, to approve the minutes as presented from the Regular Meeting of the Board of Directors on 05-08-25.

M. Humphrey seconded the motion.

The board **VOTED** unanimously to approve the motion.

#### V. Public Comment - Closed Session

##### A. Public Comment

There was no public comment regarding Closed Session.

#### VI. Adjourn to Closed Session

##### A. The Board Will Consider and May Act on Any of the Closed Session Matters

S. Fraire made a motion to W. Hall, Board President, to adjourn to Closed Session at 9:01 a.m.

S. Houle seconded the motion.

The board **VOTED** unanimously to approve the motion.

#### VII. Closed Session

##### A. Closed Session Agenda

###### 1. CONFERENCE WITH LEGAL COUNSEL - ANTICIPATED LITIGATION

(Gov. Code Section 54956.9(d)(2).) *CDE No. S-0902-24/25*

###### 2. CONFERENCE WITH LEGAL COUNSEL - ANTICIPATED LITIGATION

(Gov. Code Section 54956.9(d)(2)) *[One matter]*

###### 3. CONFERENCE WITH LEGAL COUNSEL - EXISTING LITIGATION

(Gov. Code Section 54956.9(d)(1).) *OAH Case No. 2025040083*

#### VIII. Reconvene Regular Meeting

##### A. Report Out Any Action Taken in Closed Session

The Regular Meeting of the Board of Directors reconvened at 9:18 a.m. W. Hall, Board President, reported that no action was taken in Closed Session.

#### IX. Public Comments/Recognition/Reports

#### **A. Public Comment**

There was no request for public comment.

### **X. Correspondence/Proposals/Reports**

#### **A. 2024-2025 School Year in Review**

Krista Woodgrift, Superintendent & CEO, presented the 2024-2025 school year highlights.

#### **B. Sage Oak Charter Schools Leadership Honorees**

Krista Woodgrift, Superintendent & CEO, recognized leadership honorees Brenda Ramirez, ASB & Student Success Support, and Candice Coffey, Assistant Superintendent of Human Resources, expressing gratitude for their contributions to Sage Oak Charter Schools and wishing them well.

#### **C. CliftonLarsonAllen LLP (CLA) Governance Entrance Letter**

Tim O'Brien, Assistant Superintendent of Business Services, reviewed the Governance Entrance Letter from CliftonLarsonAllen LLP (CLA).

### **XI. Consent Agenda**

#### **A. Consent - Business Services**

1. Check Register - May 2025
2. Report of Investment Activity - April 2025
3. Ratification of Victorville Chevrolet Cadillac Sale Contracts
4. Ratification of School Pathways Quote Form with Sage Oak Charter Schools (Renewal)
5. Ratification of School Pathways Quote Form, SOW #19581
6. Ratification of School Pathways Quote Form, SOW #20274
7. Ratification of Total Technology Quote No. D22238
8. Ratification of City of Redlands Park Reservation QPR-2364
9. Ratification of Tech & Mortar, LLC Statement of Work (Renewal)
10. Ratification of Hyatt Place Riverside/Downtown Group Sales Agreement
11. Ratification of School Services of California, Inc. Contract (Renewal)
12. Ratification of KnowBe4 Quote #Q-1281734 (Renewal)
13. Ratification of Pepper & Olive Letter of Agreement
14. Ratification of BEC Industrial Estimate #SAGEOA-050925
15. Ratification of Fullerton Parks & Recreation Permit #16377
16. Ratification of Opichi LLC Agreement
17. Ratification of Newfront Property & Casualty Insurance Policy Renewals
18. Ratification of Tech to School Buyback Quote

19. Ratification of Courtyard by Marriott Event Sales Agreement
20. Ratification of Raymond Intralogistics Solutions West Proposal

## **B. Consent - Education Services**

1. Approval of Sage Oak Charter Schools Parent and Student Handbook
2. Approval of 2025-2026 Sage Oak Charter Schools Title 1 School-Parent/Guardian Compact
3. Approval of 2025-2026 Sacramento One-Day Field Trip, Grades 8-12
4. Approval of 2025-2026 Boston/Philadelphia Overnight Field Trip, Grades 9-12
5. Ratification of Instructure, Inc. Order Form, Canvas (Renewal)
6. Ratification of Instructure, Inc. Order Form, Mastery Connect (Renewal)
7. Ratification of Renaissance Learning, Inc., Quotes #Q-187725 & #Q-197048 (Renewal)

## **C. Consent - Human Resources**

1. Approval of Certificated Personnel Report
2. Approval of Classified Personnel Report
3. Approval of Job Descriptions
4. Approval of 2025-2026 Sage Oak Charter Schools Employee Handbook Revisions
5. Approval of Sage Oak Charter Schools Comprehensive School Safety Plan (CSSP) Revisions
6. Approval of 2025-2026 11-Month Certificated Employee Work Year Calendars

## **D. Consent - Policy Development**

1. Approval of Changes to Existing Board Policies Revised/Reviewed/Rescinded

### **1000 Series- Community Relations**

- 1020-SO Field Trip Policy
- 1025-SO Uniform Complaint Policy
- 1035-SO Access to Public Records Policy

### **3000 Series- Business/Non-Instructional**

- 3010-SO Fiscal Control Policy and Procedures
- 3015-SO Investment Policy
- 3150-SO Authorization to Hire Policy (*Rescinded*)

### **5000 Series- Student Services**

- 5065-SO Enrollment Policy
- 5090-SO Harassment, Intimidation, Discrimination, and Bullying Policy
- 5120-SO Transitional Kindergarten/Kindergarten Enrollment Policy (*Rescinded*)

### **6000 Series- Instruction**



6005-SO Parent and Family Engagement Policy  
6010-SO Independent Study Policy  
6015-SO Comprehensive Sexual Health Education Policy  
6025-SO Section 504 Policy  
6030-SO Education for Foster and Mobile Youth Policy  
6035-SO Mathematics Placement Policy  
6040-SO Assessment Policy  
6075-SO Special Education Certificate of Completion  
6095-SO Repeated Courses Policy  
6115-SO Attendance, Support, and Involuntary Disenrollment Policy  
6120-SO Meeting Policy  
6125-SO Report Card Policy  
6150-SO Intervention Policy

**E. (Action) Approval of Consent Agenda**

Items listed under Consent are considered routine and will be approved/adopted by a single motion. There will be no separate discussion of these items; however, any item may be removed from the Consent Agenda upon the request of any member of the Board, discussed, and acted upon separately.

M. Humphrey made a motion to W. Hall, Board President, to approve the items listed under the Consent Agenda as presented.

S. Houle seconded the motion.

The board **VOTED** unanimously to approve the motion.

**XII. Business Services**

**A. (Action) Approval of Proposition 28 Arts and Music in Schools Funding, 2024-2025 Annual Reports for Sage Oak Charter Schools**

P. Matz made a motion to W. Hall, Board President, to approve the Proposition 28 Arts & Music in Schools Funding, 2024-2025 Annual Reports for Sage Oak Charter Schools as presented.

S. Fraire seconded the motion.

The board **VOTED** unanimously to approve the motion.

**B. (Action) Approval of Expenditure Plan for the Arts, Music, & Instructional Materials Block Grant (AMIM)**

M. Humphrey made a motion to W. Hall, Board President, to approve the expenditure plan for the Arts, Music, & Instructional Materials (AMIM) Block Grant as presented.

S. Houle seconded the motion.

The board **VOTED** unanimously to approve the motion.

**C. (Action) Approval of Sage Intacct Multi-Year Proposal (Renewal)**

P. Matz made a motion to W. Hall, Board President, to approve the Sage Intacct multi-year proposal (renewal), as presented.

S. Fraire seconded the motion.

The board **VOTED** unanimously to approve the motion.

**D. (Action) Approval of 2025–2026 Consolidated Application and Reporting System (CARS)**

S. Houle made a motion to W. Hall, Board President, to approve the 2025-2026 Consolidated Application & Reporting System (CARS) data submission as presented.

M. Humphrey seconded the motion.

The board **VOTED** unanimously to approve the motion.

**E. (Action) Approval of Settlement Agreement (Lares v. The Collaborative Charter Services Organization, et al.)**

M. Humphrey made a motion to W. Hall, Board President, to approve the settlement agreement (Lares v. The Collaborative Charter Services Organization, et al.) as presented.

S. Fraire seconded the motion.

The board **VOTED** unanimously to approve the motion.

**XIII. Human Resources**

**A. (Action) Approval of 2025-2026 Certificated Educator Salary Schedule Revisions**

S. Houle made a motion to W. Hall, Board President, to approve the 2025-2026 Certificated Educator Salary Schedule revisions as presented.

P. Matz seconded the motion.

The board **VOTED** unanimously to approve the motion.

**XIV. Operations and Accountability**

**A. (Action) Approval of 2025-2026 Sage Oak Charter Schools English Learner (EL) Master Plan, Presented by Lorinda Loughlin, Assessment Coordinator**

S. Houle made a motion to W. Hall, Board President, to approve the 2025-2026 Sage Oak Charter Schools English Learner (EL) Master Plan as presented.

S. Fraire seconded the motion.

The board **VOTED** unanimously to approve the motion.

**XV. Policy Development**

**A. (Action) Approval of New 3155-SO Scholarship Program Policy**

S. Houle made a motion to W. Hall, Board President, to approve the new 3155-SO Scholarship Program Policy as presented.

M. Humphrey seconded the motion.

The board **VOTED** unanimously to approve the motion.

## **XVI. Public Hearing**

### **A. (Hearing) 2025-2026 Local Control and Accountability Plans (LCAP) and Local Performance Indicator Self-Reflection Reports, Presented by Jodi Cope, Director of Operations & Accountability**

A Public Hearing was conducted regarding the 2025-2026 Local Control and Accountability Plans (LCAPs) for Sage Oak Charter Schools.

Jodi Cope, Director of Operations & Accountability, presented the 2025-2026 LCAPs, which included the Federal Addendums. She also presented the Local Performance Indicators.

There was no request for public comment.

Hearing Opened: 10:00 a.m.

Hearing Closed: 10:16 a.m.

### **B. (Hearing) 2025-2026 Proposed July Budget - Sage Oak Charter Schools**

A Public Hearing was conducted regarding the 2025-2026 Proposed July Budget for Sage Oak Charter Schools.

Tim O'Brien, Assistant Superintendent of Business Services, presented the 2025-2026 Proposed July Budget.

There was no request for public comment.

Hearing Opened: 10:17 a.m.

Hearing Closed: 10:31 a.m.

## **XVII. Calendar**

### **A. Future Meetings**

The next scheduled meeting will be a Regular Board of Directors Meeting held on June 18, 2025.

## **XVIII. Comments**

### **A. Board Comments**

The Board commended the Sage Oak team for their leadership, collaboration, and dedication. They highlighted the school's continued focus on student achievement and its

commitment to high-quality programs. Candice Coffey and Brenda Ramirez were honored for their years of service. The Board recognized Tim O'Brien and the administrative team for strong financial leadership and thoughtful innovation, including AI integration and a positive reputation with auditors. They expressed pride in Sage Oak's mission-driven work and look forward to continued success.

## B. Superintendent Comments

Superintendent Woodgrift honored the Board for their service and consistency over the past 10 years, recognizing their collective 195 years of educational experience. She thanked them sincerely for their leadership, support, and the positive impact they have had on Sage Oak's development.

## XIX. Closing Items

### A. Adjourn Meeting

S. Fraire made a motion to W. Hall, Board President, to adjourn the Regular Meeting of the Board of Directors on June 12, 2025.

S. Houle seconded the motion.

The board **VOTED** unanimously to approve the motion.

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 10:40 AM.

Respectfully Submitted,  
W. Hall

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## Documents used during the meeting

- Sage Oak Highlights\_May 2025.pdf
- Sage Oak Charter Schools Leadership Honorees\_6.12.2025.pdf
- CliftonLarsonAllen LLP (CLA) Governance Entrance Letter\_6.12.2025.pdf
- BUS Consent - Business Services\_6.12.2025.pdf
- BUS Consent - Education Services\_6.12.2025.pdf
- BUS Consent - Human Resources\_6.12.2025.pdf
- BUS Consent - Policy Development\_6.12.2025.pdf
- Proposition 28 Arts & Music in Schools Funding, 2024-2025 Annual Report\_Sage Oak Charter School #1885\_6.12.2025.pdf
- Proposition 28 Arts & Music in Schools Funding, 2024-2025 Annual Report\_Sage Oak Charter School - Keppel #1886\_6.12.2025.pdf
- Proposition 28 Arts & Music in Schools Funding, 2024-2025 Annual Report\_Sage Oak Charter School - South #2051\_6.12.2025.pdf

- Expenditure Plan for the Arts, Music, & Instructional Materials Block Grant (AMIM)\_6.12.2025.pdf
- Sage Intacct Multi-Year Proposal\_6.12.2025.pdf
- CARS 2025-2026 Application & Certification\_Sage Oak Charter School #1885\_6.12.2025.pdf
- CARS 2025-2026 Application & Certifications\_Sage Oak Charter School - Keppel #1886\_6.12.2025.pdf
- CARS 2025-2026 Application & Certifications\_Sage Oak Charter School - South #2051\_6.12.2025.pdf
- 2025-2026 Sage Oak Charter Schools Certificated Educator Salary Schedule Revisions\_6.12.2025.pdf
- 2025-2026 Sage Oak Charter Schools Certificated Educator Salary Schedule - Pending Approval\_6.12.2025.pdf
- 2025-2026 Sage Oak Charter Schools EL Master Plan\_Presentation\_6.12.2025.pdf
- 2025-2026 Sage Oak Charter Schools EL Master Plan\_Summary of Changes\_6.12.2025.pdf
- 2025-2026 Sage Oak Charter Schools EL Master Plan\_6.12.2025.pdf
- 2025-2026 Sage Oak Charter Schools El Master Plan\_Redline\_6.12.2025.pdf
- 3155-SO Scholarship Program Policy\_6.12.2025.pdf
- 2025-2026 Local Control and Accountability Plans (LCAP) and Local Indicators\_Presentation\_6.12.2025.pdf
- 2025-2026 LCAP Plan Summary - Sage Oak Charter School #1885\_6.12.2025.pdf
- 2025-2026 LCAP Plan Summary - Sage Oak Charter School - Keppel #1886\_6.12.2025.pdf
- 2025-2026 LCAP Plan Summary - Sage Oak Charter School - South #2051\_6.12.2025.pdf
- 2025-2026 Local Performance Indicator Self-Reflection for Sage Oak Charter School #1885\_6.12.2025.pdf
- 2025-2026 Local Performance Indicator Self-Reflection for Sage Oak Charter School - Keppel #1886\_6.12.2025.pdf
- 2025-2026 Local Performance Indicator Self-Reflection for Sage Oak Charter School - South #2051\_6.12.2025.pdf
- 2025-2026 Proposed July Budget Presentation\_6.12.2025.pdf
- 2025-2026 Proposed July Budget - Sage Oak Charter Schools\_6.12.2025.pdf
- Education Protection Account (EPA) - Sage Oak Charter School #1885\_6.12.2025.pdf
- Education Protection Account (EPA) - Sage Oak Charter School - Keppel #1886\_6.12.2025.pdf

- Education Protection Account (EPA) - Sage Oak Charter School - South  
#2051\_6.12.2025.pdf

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**FOR MORE INFORMATION**

For more information concerning this agenda, contact  
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## Coversheet

### (Action) Approval of Minutes for June 18, 2025 Regular Meeting of the Board of Directors

<b>Section:</b>	IV. Approve Minutes
<b>Item:</b>	B. (Action) Approval of Minutes for June 18, 2025 Regular Meeting of the
Board of Directors	
<b>Purpose:</b>	Approve Minutes
<b>Submitted by:</b>	
<b>Related Material:</b>	Minutes for Regular Meeting of the Board of Directors on June 18, 2025

DRAFT

SAGE OAK  
CHARTER SCHOOLS



## Sage Oak Charter Schools

### Minutes

#### Regular Meeting of the Board of Directors

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##### Date and Time

Wednesday June 18, 2025 at 9:00 AM

##### Location

**Sage Oak Charter Schools**

1473 Ford Street, Suite #105

Redlands, CA 92373

##### [Join Zoom Meeting](#)

ID: 95093486389

Passcode: 388460

##### [\(US\) +1 929-436-2866](#)

Passcode: 388460

##### Teleconference Locations

1185 Calle Dulce, Chula Vista, CA 91910

39251 Camino Las Hoyas, Indio, CA 92203

16222 Quail Rock Road, Ramona, CA 92065

1420 E. Palomar St., Chula Vista, CA 91913 (*Teleconference location will not be utilized.*)

25 Kingston Court E., Coronado CA 92118

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Pursuant to the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990, any individual with a disability who requires reasonable accommodation to attend or participate in this meeting of the Governing Board may request assistance by contacting Sage Oak Charter Schools.

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**Directors Present**

M. Humphrey (remote), P. Matz (remote), S. Fraire (remote), S. Houle (remote), W. Hall (remote)

**Directors Absent**

*None*

**Guests Present**

E. Horta (remote), K. Woodgrift (remote), L. Snee

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**I. Opening Items**

**A. Call the Meeting to Order**

W. Hall called a meeting of the board of directors of Sage Oak Charter Schools to order on Wednesday Jun 18, 2025 at 9:00 AM.

**B. Record Attendance**

**II. Pledge of Allegiance**

**A. Led by Board President or designee**

W. Hall, Board President, led the meeting in the Pledge of Allegiance.

**III. Approve/Adopt Agenda**

**A. (Action) Approval of Agenda for June 18, 2025 Regular Meeting of the Board of Directors**

M. Humphrey made a motion to W. Hall, Board President, to approve the agenda as presented for the June 18, 2025, Regular Meeting of the Board of Directors.

S. Fraire seconded the motion.

The board **VOTED** unanimously to approve the motion.

#### **IV. Public Comments/Recognition/Reports**

##### **A. Public Comment**

There was no request for public comment.

#### **V. Board Governance**

##### **A. (Action) Approval of 2025-2026 Board Evaluator Stipend**

P. Matz made a motion to W. Hall, Board President, to approve the 2025-2026 Board evaluator stipend as presented.

S. Houle seconded the motion.

The board **VOTED** unanimously to approve the motion.

#### **VI. Operations and Accountability**

##### **A. (Action) Adoption of 2025-2026 Local Control and Accountability Plans (LCAP)**

M. Humphrey made a motion to W. Hall, Board President, to adopt the 2025-2026 Local Control and Accountability Plans (LCAPs) for Sage Oak Charter Schools as presented.

S. Fraire seconded the motion.

The board **VOTED** unanimously to approve the motion.

##### **B. (Action) Approval of 2025-2026 Local Performance Indicator Self-Reflection Reports for Sage Oak Charter Schools**

P. Matz made a motion to W. Hall, Board President, to approve the 2025-2026 Local Performance Indicator Self-Reflection Reports for Sage Oak Charter Schools as presented.

S. Houle seconded the motion.

The board **VOTED** unanimously to approve the motion.

#### **VII. Business Services**

##### **A. (Action) Adoption of 2025-2026 July Budget - Sage Oak Charter Schools**

M. Humphrey made a motion to W. Hall, Board President, to adopt the 2025-2026 July Budget for Sage Oak Charter Schools as presented.

S. Fraire seconded the motion.

The board **VOTED** unanimously to approve the motion.

## VIII. Human Resources

### A. (Action) Approval of Modification of Superintendent of Schools' Employment Agreement and 2025-2026 Salary Placement

S. Houle made a motion to W. Hall, Board President, to approve the modification of the Superintendent of Schools' Employment Agreement and 2025-2026 salary placement as presented.

S. Fraire seconded the motion.

The board **VOTED** unanimously to approve the motion.

## IX. Calendar

### A. Future Meetings

The next scheduled meeting will be a Board of Directors Study Session held on August 14, 2025.

## X. Closing Items

### A. Adjourn Meeting

P. Matz made a motion to W. Hall, Board President, to adjourn the Regular Meeting of the Board of Directors on June 18, 2025.

S. Fraire seconded the motion.

The board **VOTED** unanimously to approve the motion.

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 9:10 AM.

Respectfully Submitted,  
W. Hall

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## Documents used during the meeting

- 2025-2026 LCAP Plan Summary - Sage Oak Charter School #1885\_6.18.2025.pdf
- 2025-2026 LCAP Plan Summary - Sage Oak Charter School - Keppel #1886\_6.18.2025.pdf
- 2025-2026 LCAP Plan Summary - Sage Oak Charter School - South #2051\_6.18.2025.pdf
- 2025-2026 Local Performance Indicator Self-Reflection for Sage Oak Charter School #1885\_6.18.2025.pdf
- 2025-2026 Local Performance Indicator Self-Reflection for Sage Oak Charter School - Keppel #1886\_6.18.2025.pdf

- 2025-2026 Local Performance Indicator Self-Reflection for Sage Oak Charter School - South #2051\_6.18.2025.pdf
- 2025-2026 July Budget - Sage Oak Charter Schools\_6.12.2025.pdf
- Education Protection Account (EPA) - Sage Oak Charter School #1885\_6.18.2025.pdf
- Education Protection Account (EPA) - Sage Oak Charter School - Keppel #1886\_6.18.2025.pdf
- Education Protection Account (EPA) - Sage Oak Charter School - South #2051\_6.18.2025.pdf
- Superintendent of Schools' Employment Agreement & 2025-26 Salary Placement Presentation\_6.18.2025.pdf
- Modification of Superintendent of Schools' Employment Agreement\_6.18.2025.pdf

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#### FOR MORE INFORMATION

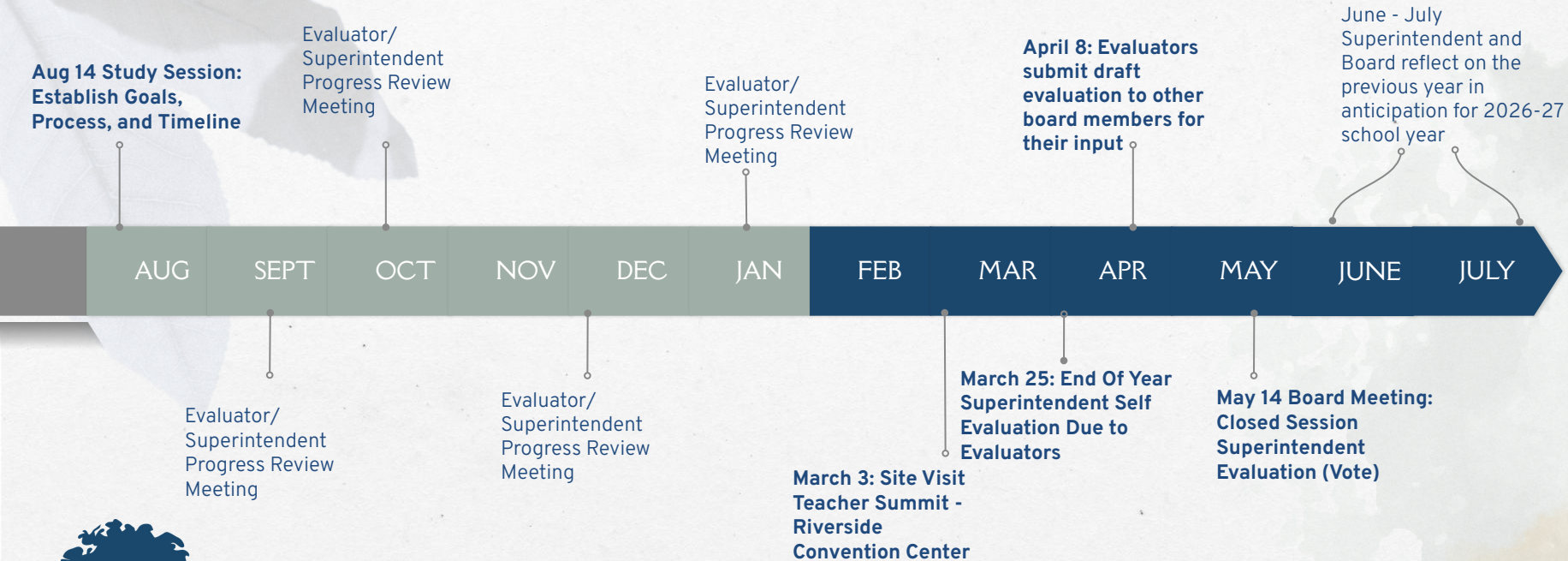
For more information concerning this agenda, contact  
Sage Oak Charter Schools.

# Coversheet

## (Action) Approval of 2025-26 Superintendent/CEO Evaluation Timeline and Plan

**Section:** X. Human Resources  
**Item:** A. (Action) Approval of 2025-26 Superintendent/CEO Evaluation Timeline  
and Plan  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:**  
2025-26 Superintendent\_CEO Evaluation Timeline and Plan\_8.14.2025.pdf

# 2025-26 Superintendent of Schools/CEO Evaluation Timeline



# Coversheet

## Annual Board of Directors' Self-Evaluation

**Section:** XI. Oral Presentations  
**Item:** A. Annual Board of Directors' Self-Evaluation  
**Purpose:**  
**Submitted by:**  
**Related Material:** Annual Board of Directors' Self-Evaluation\_DRAFT\_8.14.2025.pdf



## Annual Board of Directors' Self-Evaluation 2024 - 2025

Issue/Concept	Complete	In Progress	Little/No Progress	Not Applicable
<b>A Solid Foundation</b>				
School has a well-drafted charter contract with its sponsoring agencies.	WH MH SH PM SF			
School has well-drafted articles and bylaws.	WH MH SH PM SF			
School's legal and financial status are clear and well understood.	WH MH SH PM SF			
Appropriate liability insurance and risk management practices are maintained at all times.	WH MH SH PM SF			
School has developed a long-term /strategic plan such as a WASC report that is reviewed and revised on an annual basis.	WH MH SH PM SF			
Long-term plans are translated into annual action plans/goals in a document such as the LCAP.	WH MH SH PM SF			
<b>Board Operations/Relations</b>				
Board members understand their legal and ethical responsibilities (duty of care/loyalty, conflict of interest).	WH MH SH PM SF			



New board members are oriented and fully briefed prior to being seated.	SH	PM		SF MH WH
Board is composed of individuals with a broad and appropriate range of expertise and experience. Board seeks outside counsel for matters beyond its expertise.	WH MH SH PM SF			
Board member selection process ensures a broad and appropriate range of expertise and experience.	SH SF WH	PM		MH
Board conducts annual self-evaluation.	WH MH SH PM SF			
Meetings are well planned with clear agendas focused on appropriate policy and action items.	WH MH SH PM SF			
Board president is a strong, capable meeting facilitator.	MH SH PM SF	WH		
Board president has developed meeting norms.	MH SH PM SF	WH		
Meetings are conducted pursuant to common ground rules (eg. Robert's Rules) that are well understood by all members.	WH MH SH PM SF			
Individual board members prepare for meetings and participate constructively.	WH MH SH PM SF			
Meeting minutes record each board meeting and are distributed promptly on the school's website after each meeting.	WH MH SH PM SF			
<b>Relationship w/ CEO</b>				
Board develops performance goals and evaluates CEO performance each year.	WH MH SH			

	PM SF			
Board has clear understanding with staff regarding where board responsibility should be to support and maximize the functioning of the schools.	WH SH PM SF MH			
Board has established a plan for succession in the event the CEO leaves/retires.	SH SF PM	WH MH		
<b>Personnel and Staffing</b>				
Board has adopted/approved a comprehensive set of personnel policies that are in line with all applicable state/federal laws & regulations. Policies are updated and an annual review will be conducted.	WH MH SH PM SF			
Clear job descriptions and staffing plans are in place.	WH MH SH PM SF			
<b>Budget and Finance</b>				
Board adopts an annual budget that maximizes the school's resources in support of mission/vision.	WH MH SH PM SF			
Board monitors the budget throughout the year via monthly updates, first interim budget and second interim budget.	WH MH SH PM SF			
Board contracts with an independent auditor each year, reviews the audit report, and takes any needed follow-up action.	WH MH SH PM SF			
Board has adopted a three-year financial plan in coordination with the school's overall three-year plan (WASC, LCAP).	WH MH SH PM SF			
Board has adopted a comprehensive set of fiscal management and control policies.	WH SH PM SF	MH		

Instruction, Curriculum, and Assessment				
Board has adopted/approved the school's curriculum and instructional programs.	WH SH PM SF	MH		
Board has adopted/approved student achievement goals/standards.	WH MH SH PM SF			
A broad-based assessment system is in place to measure progress toward instructional goals/standards.	WH MH SH PM SF			
The Instructional program is in alignment with the state requirements and terms of charter.	WH MH SH PM SF			
Student assessment data is assembled in a comprehensive, coherent fashion, presented to the board, and reviewed and analyzed in-depth on a regular basis.	WH MH SH PM SF			
School reports on student achievement to charter granting agencies on a regular basis as part of the ongoing oversight and renewal process.	WH MH SH PM SF			

**Board Member Comments on Strengths:****W. HALL-**

- Superintendent's goals are developed collaboratively with the Board, and with input from the Leadership Team. In turn, these goals are incorporated among the entire leadership team and staff. Lastly, the adopted goals are specifically addressed in the monthly Board updates and reports from each department.

**S. FRAIRE-**

- Sage Oak provides an outstanding learning environment for all students and, at the same time, a unique support system for parents and educational partners. Krista Woodgrift, her administrative team, teachers, and every individual involved in the process are to be commended for their hard work and dedication. Krista sets a positive tone, designs realistic goals, and is consistent in seeking solutions throughout the school year. She acknowledges those around her for their accomplishments and paves an avenue for success. Sage Oak is a true model for other Charter Schools to follow!

**M. HUMPHREY-**

- There is a strong commonality of purpose and refined communication among Board members, and we enjoy meeting staff and students during our meetings.

**S. HOULE-**

- The Board continues to keep student learning and achievement a priority by focusing on policies and resources that will help all students thrive and succeed. The school board is effective because they have a shared belief and values about what students can learn and Sage Oak's ability to teach the students.

**P. MATZ-**

- This is an extremely cohesive board with a strong focus on supporting all Sage Oak staff and programs. The level of consensus observed is rare, and the background experiences of the individual members combine to form a powerful team.

**Board Member Comments on Areas of Growth and Future Needs:**

**W. HALL-**

- I believe it would be helpful to periodically review the succession plan in case the Superintendent needs to take a leave of absence.

**S. FRAIRE-**

- As in the past, continue to hire new individuals that match the high standards established by Sage Oak, Board Evaluation, as connected with the student growth process.

**M. HUMPHREY-**

- These are all in process.

**S. HOULE-**

- Continuing to work with State officials to secure adequate funding for Sage Oak.

**P. MATZ-**

- It has been a long time since we've needed to replace a Sage Oak board member. For that reason, the board member selection process and the orientation plan need to be revisited.

# Coversheet

## Sage Oak Charter Schools Strategic Plan 2025-26

<b>Section:</b>	XI. Oral Presentations
<b>Item:</b>	B. Sage Oak Charter Schools Strategic Plan 2025-26
<b>Purpose:</b>	
<b>Submitted by:</b>	
<b>Related Material:</b>	Sage Oak Charter Schools Strategic Plan 2025-26_8.14.2025.pdf





# 2025-26 SAGE OAK STRATEGIC PLAN



**Student Success**



**Engagement**



**Smart Learning  
Systems**

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## ***Mission***

Educating students through a personalized and collaborative learning approach, empowering them to lead purposeful and productive lives.

## ***Vision***

Sage Oak students embrace their unique potential and are inspired to positively impact their communities.

## ***Core Values***

With students always at the forefront, we are *SAGE*, and we value  
*Service | Accountability | Growth Mindset | Excellence*

- *Service* – We value relationships and understand that we are here to provide a high level of service to our students, parents, community, and one another.
- *Accountability* – We build trust with educational partners by staying compliant with state and federal regulations while operating with integrity and transparency.
- *Growth Mindset* – We focus on working hard, learning continuously, and pushing ourselves to reach new heights. We stay current on best practices, educational trends and strive to offer innovative and engaging opportunities for our students.
- *Excellence* – We strive for a standard of excellence in all that we do. We equip students and staff with the necessary tools, resources, and support to help them achieve their full potential.



## Introduction

At Sage Oak Charter Schools, our mission to educate students through a personalized and collaborative learning approach, empowering them to lead purposeful and productive lives, remains the guiding force behind every goal we set and every action we take. As we enter the 2025–2026 school year, we continue to build on the momentum of our multi-year strategic plan by deepening our focus, expanding opportunities, and refining systems that support student growth, staff development, community connection, and the thoughtful integration of AI to lead in educational innovation.

This plan reflects a continuation of our long-term vision and was developed through a collaborative process that included feedback from educational partners and alignment with our Local Control Accountability Plan (LCAP) initiatives and Western Association of Schools and Colleges (WASC) goals. Parent, student, and staff surveys highlighted the importance of personalized learning, teacher connection, and access to support. Our Parent Advisory, English Learner Advisory, and Student Advisory Committees provided valuable input on priorities such as college and career readiness, student well-being, and equitable access. Leadership planning sessions and department-level reviews helped ensure alignment with strategic metrics and schoolwide goals.

To bring this work to life, we are launching a focused set of initiatives designed to strengthen impact and deepen alignment across the organization. **Personalization 2.0** represents a renewed commitment to individualized learning, enhanced by AI-driven tools and student-driven pathways that connect personal interests with meaningful goals. The **Professional Development Passport** offers a clear, personalized roadmap for staff growth and leadership development. Teachers will implement **Power Standards** to ensure instruction remains targeted, coherent, and aligned to student success across grade levels. **Sage Crates**, curated hands-on learning kits sent to families, support at-home engagement and enrich the student learning experience. This year also brings a deeper emphasis on self-awareness, including the use of **True Colors** to strengthen individual insight and team dynamics, which are key to fostering a supportive and collaborative learning environment where students feel understood, valued, and better equipped to grow both academically and emotionally. Our continuing integration of **AI tools** across both instruction and operations positions Sage Oak to lead in the evolving landscape of innovative, student-centered education.



# Local Control Accountability Plan (LCAP)

## GOALS

## ACTIONS

## METRICS

### STUDENT SUCCESS

To improve academic performance and College and Career Readiness for all students, we will implement comprehensive, grade-appropriate College and Career Readiness programs. This initiative will cultivate the confidence, skills, and spirit of innovation necessary for each student to confidently navigate their unique paths, enabling them to make a meaningful impact in their communities and the world.

CPSELs: 1, 2, 4, 5, 6, 7, 8

- Integrate career, community, and life skills into comprehensive K-12 pathways.
- Refine a personalized, data-informed multi-tiered system of support for all students..
- Improve math proficiency for Students with Disabilities (SWD) by increasing the percentage of students with disabilities participating in math interventions.
- Create a unified, data-informed articulation process that smoothly transitions students through each grade band while integrating critical feedback from graduates.
- Increase the percentage of both English learner (EL) and Long-Term English learner (LTEL) students making progress toward proficiency as measured by the state language proficiency assessment, and increase the English learner reclassification rate by increasing participation with English Language Development (ELD) synchronous instruction. (NEW LCAP requirement to add LTEL students due to student enrollment reaching 15 and adapting action to include participation in ELD as more measurable)

- % Students completing A-G pathways and CTE pathways
- % Students achieving a score of 3 or higher on AP exams
- College Career Preparedness (College Career Indicator %)
- % Students graduated
- Maintenance of low middle school dropout rates
- Maintenance of low high school dropout rates
- Expansion of K-8 live synchronous instruction courses aligned with CTE pathways
- State and local math and reading scores
- Student/parent belief in access to instructional resources necessary to align with robust state standard education
- % Students receiving interventions who demonstrate growth equivalent to one year or more in English Language Arts and Mathematics
- % Students with disabilities participating in math intervention programs
- % Teachers feel equipped to transition their students to the next grade level band
- % English learners making progress toward English proficiency, including reclassification rate improvement
- % English learners' participation in ELD synchronous instruction courses
- % Parents/students/staff affirming access to resources supporting EL students' achievement
- **2025-26 New Metrics: (Action E)**
- % Long Term English Learner (LTEL) students making progress toward English proficiency
- Number of professional development opportunities focused on supporting English Language Development (ELD) & LTEL instruction

ENGAGEMENT	<p>In order to enhance student, parent, and staff engagement, we will establish an environment that fosters connectedness and professional growth.</p> <p><i>CPSELs: 1, 2, 3, 4, 5, 6, 7</i></p>	<ul style="list-style-type: none"> <li>a. Increase opportunities for parents, students, and staff to connect with each other and with school leadership, fostering a sense of community and alignment with the school's mission and vision.</li> <li>b. Develop purposeful pathways for growth and opportunities for professional development.</li> <li>c. Increase professional development for live instruction.</li> <li>d. Develop a system to increase access and consistency for social and emotional resources and interventions.</li> </ul>	<ul style="list-style-type: none"> <li>• Student/parent/staff satisfaction survey results related to community engagement, school climate, connectedness, and confidence in job performance</li> <li>• % Credentialed teachers</li> <li>• % School attendance rates</li> <li>• % Chronic absenteeism</li> <li>• % Suspension and/or expulsion rates</li> <li>• Student/staff retention rate</li> <li>• Pathway for advancement participation rates</li> <li>• Increased number of professional development opportunities for all staff with a focus on live instruction</li> <li>• % Student/parent/staff who feel informed about the social and emotional resources provided by Sage Oak</li> <li>• Increased number of synchronous support groups and/or counselor-led groups</li> </ul>
SMART LEARNING SYSTEMS	<p>Leverage technologies, specifically Artificial Intelligence (AI), to enhance data-driven decision-making, automate routine operational processes, and provide personalized learning pathways for students, thereby establishing scalable systems that ensure long-term sustainability, promote academic growth, and increase operational efficiency.</p> <p><i>CPSELs: 1, 2, 3, 4, 5, 6, 7, 9</i></p>	<ul style="list-style-type: none"> <li>a. Evaluate, integrate, and optimize technology to streamline and automate operational processes and procedures.</li> <li>b. Implement AI-driven personalized learning strategies to maximize student learning.</li> </ul>	<ul style="list-style-type: none"> <li>• Staff-to-student ratio</li> <li>• Staff satisfaction survey results: improvements in work efficiency and satisfaction, and increased confidence in using AI tools to improve learning outcomes</li> </ul>

## Action Steps

### Goal 1: STUDENT SUCCESS

*To improve academic performance and College and Career Readiness for all students, we will implement comprehensive, grade-appropriate College and Career Readiness programs. This initiative will cultivate the confidence, skills, and spirit of innovation necessary for each student to confidently navigate their unique paths, enabling them to make a meaningful impact in their communities and the world.*

*Strategy A: Integrate career, community, and life skills into comprehensive K-12 pathways*

*Strategy B: Refine a personalized, data-informed multi-tiered system of support for all students*

*Strategy C: Improve math proficiency for students with disabilities by increasing their participation in synchronous math interventions.*

*Strategy D: Create a unified, data-informed articulation process that smoothly transitions students through each grade band while integrating critical feedback from graduates.*

*Strategy E: Increase the percentage of both English learner (EL) and long-term English learner (LTEL) students making progress toward proficiency as measured by the state language proficiency assessment and increase English learner reclassification rate by increasing participation with English Language Development (ELD) synchronous instruction..*



## Goal 1: Student Success

### Strategic Plan Subactions

2023-24	2024-25	2025-26
<u>K-12 College Career Pathways</u> Add new Oakschool classes that will support the building of future pathways; Add two art teachers to begin building the art pathway	<u>K-12 College Career Exploration</u> Increase the number of Oakschool classes that align with the California industry sectors and communicate this alignment to teachers, parents, and students	<u>K-12 College Career Exploration</u> Continue to increase the number of Oakschool classes that align with the California industry sectors. Consider prioritizing increasing the number of middle school classes that align with our Sage Oak Career Technical Education (CTE) pathways that show a high level of student interest. Continue to communicate the alignment to teachers, parents, and students.
	<u>College-Career Exploration (Leadership)</u> Equip the leadership team with knowledge and tools to understand students' interests, personalities, strengths, and work values. This understanding will enable leadership to support teachers in guiding students toward suitable career paths effectively.	<u>College-Career Exploration (Teachers/Students)</u> Implement a college and career curriculum, such as Pathful, and utilize tools that help both students and teachers understand students' interests, personalities, strengths, and work values. This will assist in identifying suitable career options and will empower students and parents to make informed choices. Integrate interest inventories into high school, college, career, and CTE courses. Additionally, administer College & Career Interest Inventories to Virtual Academy middle school students to foster early career awareness and planning.
	Continue to add Oakschool classes/school opportunities related to college-career exploration.	Continue to add Oakschool career exploration classes.
<u>College, Career &amp; Service Field Trips</u> Increase the number of field trips that align with goal; Add two art teachers to add art field trips	<u>College, Career &amp; Service Field Trips</u> Integrate college/career field trips aligned with each CTE pathway from middle school through high school	<u>College, Career &amp; Service Field Trips</u> Integrate college/career field trips aligned with each CTE pathway from elementary school through high school

College, Career & Service Podcasts

Increase the number of podcasts that align with goal

College, Career & Service Podcasts

Maintain the number of podcasts that align with goal

College, Career & Service Podcasts

Maintain the number of podcasts that align with goal

Increase the number of college and career avatar videos, highlighting CTE pathways. Look for opportunities to advertise and support career fairs, college fairs, or other events happening to ensure all students and families have access.

High School CTE Pathways

Add Sports Medicine CTE Pathway; Further develop Child Development Pathway; Add computer science classes as building blocks for future Computer Science CTE pathway

High School CTE Pathways

Add Computer Science CTE Pathway

High School CTE Pathways

Add AI as a pathway within the Computer Science CTE Pathway

Establish clear criteria and a defined process for evaluating when a new Career Technical Education (CTE) pathway is needed. Use this process to assess the demand and feasibility of adding new pathways for 2026–27.

Prioritize the following for our CTE pathways:

\*Computer Science: Add AI as a component

\*Entrepreneurship: Add internal concentrator course, if staffing allows

\*Sports Medicine: Add internal capstone course, if staffing allows

\*Child Development: Add internal capstone course, if staffing allows

Utilize our CTE teachers to grow partnerships with businesses and organizations to increase real-world learning experiences for students through internships. Develop a structured internship program that aligns with student interests and career pathways, ensuring accessibility and meaningful participation.

Develop and offer core math classes tailored to CTE pathways, such as Business Math for the Entrepreneur pathway, Algebra for Art for the Arts pathway, and Math for Elementary School Teachers for the Child Development pathway. Initially, explore existing offerings at community colleges, and if sufficient student interest and staffing allow, expand to provide these courses



<p><u>High School Student Course Supports</u> Add a full-time high school counselor focusing on college and career readiness to provide additional support beyond the students' Education Advisor</p> <p>In the student information system, align the course titles to ensure students are taking the right courses to reach college and career preparedness</p>	<p><u>High School Student Course Supports</u> Transfer responsibility of course assignments to the counselor (from the Education Advisors) so that we can continue to increase the alignment of courses with CCI alignment</p>	<p><u>High School Student Course Supports</u> Add a second high school counselor; increase caseload of EAs to fund if needed</p>
<p><u>AVID</u> Implement Phase 2 in Virtual Learning Academy and high school</p>	<p><u>AVID</u> High School: Full AVID 9 elective implementation in high school, as well as completing AVID certification for high school</p> <p>Virtual Learning Academy: Broaden college and career initiative with AVID, utilizing Pathful at the middle school level, completing StrengthsFinder surveys for all grade levels, and expanding college tour opportunities for middle school students. Enhance writing instruction by using a writing curriculum, professional development for teachers, and systematic assessments</p>	<p><u>AVID</u> High School: Establish an AVID 10 elective</p> <p>Middle School: Establish an elective for 8th-grade students focused on AVID strategies</p> <p>Personalized Learning Academy: Integrate AVID principles by equipping teachers and/or through Oakschool classes and parent training</p>
<p><u>Intervention</u> Add math intervention program to existing reading intervention program; Add math intervention teacher; Add yearlong math Oakschool courses</p>	<p><u>Intervention</u> Prioritize additional math and English Language Arts intervention teachers in the budget. Develop and train new Reading Specialists and Math Intervention teachers using evidence-based practices</p>	<p><u>Intervention</u> Prioritize additional math and English Language Arts intervention teachers in the budget. Implement new intensive math classes for 4th and 5th-grade students. Implement a new math curriculum in elementary intervention classes and small-group math support for K-3rd grades.</p>

Increase Direct Instruction for Students in Math

Develop a plan for increasing direct instruction for students in math which might include incentivizing math Oakschool classes through curriculum/class at no cost to IFs; requiring students below grade level to take a live math class; hiring dedicated math teachers who do not have a caseload of students in order to increase the number of math classes we can provide.

Increase Direct Instruction for Students in Math

Implement the plan determined in Year 1: Expand live Oakschool math class offerings to 4th – 8th grades with no cost to instructional funds to encourage full-year enrollment. Pilot a specialized power standard math class for TK/K and 6th-grade students.

Virtual Learning Academy and Oakschool: Identify the math power standards which will be used to improve instruction and student support

Increase Direct Instruction for Students in Math

Analyze the effectiveness of the previous year's plan to refine the plan as needed to maximize student success

Oakschool: Prioritize teaching the power standards to maximize student success

Virtual Learning Academy: Integrate power standards along with MasteryConnect assessments to increase student math achievement in math.

Expand the use of power standards school-wide by providing comprehensive training on power standards, common assessments, and instructional strategies to ensure consistency and alignment in teaching and learning.

Reduce Number of Students Using Below-Grade-Level Curriculum

Require teachers to meet with their regional mentor for discussion and approval for all general education students who are using curriculum below grade level; Track number of students using below grade level curriculum

Reduce Number of Students Using Below-Grade-Level Curriculum

Revisit and refine the plan. Consider requiring specific curriculum for special education students to ensure grade-level exposure with built-in scaffolding

Continue to discuss with the regional mentor for approval for all curriculum below grade level. Consider collaborating with the curriculum coordinator on this task

The regional mentor will consult with the assigned program specialist regarding students using curriculum more than two grade levels below

Reduce Number of Students Using Below-Grade-Level Curriculum

Reevaluate the effectiveness of the 24/25 plan to identify areas of success and those needing improvement, in order to refine the strategy for 25/26.

Multilingual/English Learner Support

Add designated English Language Development teacher and classes; Add K-2 early literacy class

Multilingual/English Learner Support

Add additional teachers/classes, as needed, based on enrollment.

Multilingual/English Learner Support

Add additional teachers/classes, as needed, based on enrollment.

Continue professional development for all teachers relating to ELPAC testing and understanding the multilingual student.



	<p>Support multilingual student access to synchronous instruction by implementing an equity tracker to monitor participation in school-wide virtual classes.</p> <p>Provide professional development for all teachers relating to ELPAC testing and understanding the multilingual student.</p>	<p>Add parent webinar and training on ELPAC and ELD instruction.</p> <p>Support multilingual student access to synchronous instruction by increasing parent communication, increasing teacher professional development and training on best practices for multilingual learners, and monitoring the equity tracker to ensure their participation in schoolwide virtual classes.</p>
<p><u>High School Special Education</u> Add two co-taught high school essentials English classes; Add co-taught Algebra and Pre-Algebra classes</p> <p>Research what credentials and/or training can cover high school special education core curriculum/classes</p>	<p><u>High School Special Education</u> Hire teacher(s) with credential/training who are qualified to teach the co-taught classes</p>	<p><u>High School Special Education</u> Continue to recruit and hire teacher(s) with credential/training who are qualified to teach the co-taught classes.</p>
<p><u>Moderate/Severe Student Needs</u> Add TeachTown as a core curriculum for our moderate/severe students</p>	<p><u>Moderate/Severe Student Needs</u> Research moderate/severe programs of other similar schools to consider other ways to serve these students</p> <p>Increase collaboration between case manager and parent by creating a parent resource guide and adding regular consultations with the parent to discuss student needs</p>	<p><u>Moderate/Severe Student Needs</u> Provide ongoing TeachTown training to general education teachers and provide office hours to the general education teachers</p> <p><b>Maintain</b> collaboration between case manager and parent by creating a parent resource guide and adding regular consultations with the parent to discuss student needs</p>
	<p><u>Students with Disabilities</u> Monitor % Students with disabilities participating in math interventions</p> <p>Research evidence-based math practices to use during SAI sessions</p> <p>Mild/Moderate teachers will attend professional development regarding evidence-based math practices</p>	<p><u>Students with Disabilities</u> Implement math evidence-based practices during service sessions</p> <p>Based on math professional development, the special education teacher on assignment (TOSA) will support staff in using evidence-based math practices.</p>

		<p>If an appropriate book is able to be found, mild/moderate (M/M) teachers will participate in a book study related to math instruction.</p> <p>Monitor student progress on school-wide assessments</p>
<p><u>Advanced Learner Programs (ALPs)</u></p> <p>Oakschool: Add additional advanced learner classes;</p> <p>Field Trips: Add advanced learner field trips</p>	<p><u>Program for Advanced and Gifted Education (PAGE)</u></p> <p>Add PAGE coordinator full-time position</p> <p>Oakschool: Improve and increase classes and program offerings.</p> <p>Refine and improve PAGE identification process.</p>	<p><u>Program for Advanced and Gifted Education (PAGE)</u></p> <p>Increase the number of students evaluated for PAGE. Improve middle school PAGE offerings.</p> <p>Oakschool: Add a middle school PAGE class.</p> <p>Add middle school honors courses; ensure staffing plan increases number of PLT+ teachers in order to do so</p> <p>Establish and implement project-based learning supplemental assignments for PAGE students.</p> <p>Align project-based learning with field trips and guest speakers to enhance student learning.</p> <p>Increase the number of PAGE students to 200 or more</p>
	<p><u>Socials</u></p> <p>Host schoolwide career fair socials and expand the high school presence to an additional location</p>	<p><u>Socials</u></p> <p>Expand the high school presence to include all locations and include a showcase of different colleges.</p>
	<p><u>Middle School Program Expansion</u></p> <p>Add a middle school coordinator full-time position; the middle school coordinator will be involved in professional learning communities, informal observations, and tailored professional development.</p> <p>Increase community-building through student hangouts, school offered parent support, and increase support for special education students who are transitioning from middle school to Sage Oak's high school program</p>	<p><u>Middle School Program Expansion</u></p> <p>Consider adding a middle school assistant principal if enrollment numbers support the need</p> <p>Implement professional development for middle school teachers focused on preparing middle school students for high school, emphasizing academic and social-emotional growth.</p> <p>Introduce middle school-specific activities and opportunities for interaction with high school students.</p>

	Develop strategic plan to transition the middle school from elementary to secondary in the 2025-26 school year, including things such as creating middle school only	Implement webinars for advanced/gifted middle school students
	<p><u>Data-Informed Articulation Process</u> Collaborate to develop a comprehensive plan to create a unified, data-informed articulation process that smoothly transitions students through each grade band while integrating critical feedback from graduates.</p> <p>Improve the 8th-grade to high school transition process by including a special course for 8th graders and adding office hours with the middle school coordinator.</p> <p>Develop a cohesive plan to connect with our graduates and gather valuable data on their post-graduation experiences. Focus on understanding how the Sage Oak program supported them and identify areas for improvement. Use this data to drive program improvements.</p>	<p><u>Data-Informed Articulation Process</u> Execute the plan developed in year one of this strategy/action item.</p> <p>Continue reaching out to graduates and utilizing the information gathered to refine our programs.</p> <p>Develop a process to collect and provide teachers with targeted, actionable data to support student transitions between grade bands, ensuring alignment with school-wide initiatives like power standards and instructional strategies.</p> <p>Disaggregate state and local assessment data by school, program, grade level, CA Dashboard student group, and provide insights and information to all appropriate stakeholders</p> <p>Refine and disaggregate student achievement data further allowing for a deeper micro-level analysis of student performance and program effectiveness.</p>

## **Action Steps**

### **Goal 2: ENGAGEMENT**

*In order to enhance student, parent, and staff engagement, we will establish an environment that fosters connectedness and professional growth.*

Strategy A: Increase opportunities for parents, students, and staff to connect with each other and with school leadership, fostering a sense of community and alignment with the school's mission and vision.

Strategy B: Develop purposeful pathways for growth and opportunities for professional development.

Strategy C: Increase professional development for live instruction.

Strategy D: Develop a system to increase access and consistency for social and emotional resources and interventions.



## Goal 2: Engagement

2023-24	2024-25	2025-26
	<u>Leadership Academy</u> Develop and execute a leadership academy for leaders new to Sage Oak	<u>Leadership Academy</u> Expand academy to aspiring leaders  Develop and execute a leadership academy that is based on the most current needs (TBD)
<u>Teacher and Leadership Induction</u> Continue partnership under an MOU with Riverside County Office of Education for teacher induction; Continue providing an internal coach for staff with preliminary administrative credentials	<u>Teacher and Leadership Induction</u> Research what it would take to develop an internal teacher induction program	<u>Teacher and Leadership Induction</u> Possible implementation of an internal teacher induction program
	<u>Work Anniversary Program</u> Develop a work anniversary program, honoring the longevity of staff serving Sage Oak, such as 1 Year, 5 Year, 10 Year. Survey staff on how to celebrate longevity through the work anniversary program.	<u>Work Anniversary Program</u> Implement appropriate staff ideas from previous year  Strengthen the Sage Milestone Program, recognizing staff longevity, through personalized offerings, clear communication, and a sustainable annual process.
<u>Wellness Initiative</u> Provide walking Pads for staff that work on their computers throughout the day and at the Redlands office	<u>Wellness Initiative</u> Implement a wellness stipend for all staff through a Flexible Spending Account.  Survey staff on how to promote wellness and utilize health provider wellness stipend(s).	<u>Wellness Initiative</u> Continue to survey staff on how to promote wellness and utilize health provider wellness stipend(s) and prepare the wellness offerings for 2026/27.  Promote staff wellness by increasing access to resources, events, and clear communication.
	<u>Professional Development - Live Instruction</u> Implement evidence-based professional development for synchronous instructors; topics will be determined based on student needs as well as teacher feedback	<u>Professional Development - Live Instruction</u> Consider increasing the number of evidence-based professional opportunities for synchronous instructors and integrate action steps or goals into follow-up meetings with supervisors.; Based on the data from year 1, consider building a full pathway of professional development for synchronous instructors

Counseling Services

Align the work of our school counselors with the goal; send counselors to training on the role of the school counselor

Counseling Services:

Increase Oakschool counseling classes offered.

Increase opportunities for parent/ guardian notification of counseling programs through parent information webinars and counselor newsletters.

Counseling Services:

Prioritize additional counselors in the budget. Continue parent/ guardian outreach through the website, newsletters, and parent webinars.

Authorizer Relationships

Visit each authorizer's board meeting 7-10 times per year to provide Sage Oak updates and to learn more about what the authorizer is doing, and maintain a positive partnership with each authorizer. Send authorizer superintendents birthday and holiday cards

Invite authorizer superintendents to be celebrated on our podcast

Authorizer Relationships

Visit each authorizer board meeting 4-6 times during the school year.

Continue to send cards.

Continue attempts to invite authorizing superintendents to join our podcast.

Visit each authorizing Superintendent twice during the school year, preferably in an informal setting.

Authorizer Relationships

Maintain plan

Advocacy/Charter Development

Present at various professional association conferences

Active involvement in political advocacy opportunities at local and state level

Develop relationships with local and state legislative officials; invite them to Sage Oak events

Develop relationships with the San Bernardino County Office of Education and Riverside Office of Education; Attend those county office board meetings

Advocacy/Charter Development

Submit proposals to present at APlus and CSDC.

Maintain existing relationships with local government officials, especially for the end-of-year celebrations and awards.

Continue to develop the relationship that's begun with the Riverside County Office of Education with the goal of a county-wide charter petition.

Continue to look for opportunities for expansion.

Continue to hold biannual meetings with representatives from CCSA. The goal is to get a seat at the council table to represent schools like ours.

Advocacy/Charter Development

Maintain plan

Parent Engagement

Leverage events, such as socials and hangouts, to intentionally create spaces where parents and students can engage with one another and school leadership

Parent Engagement

Leverage events, such as socials and hangouts, to intentionally create spaces where parents and students can engage with one another and school leadership

Increase parent involvement in the PAC, ELAC, and STAC through targeted marketing and advertising.

Create social media posts and email campaigns to raise awareness about upcoming socials and hangouts

Implement a system to track and maintain contact with alumni, gathering data on their post-graduation experiences to assess how Sage Oak supported them and identify areas for improvement.

Enhance outreach efforts in relation to social/emotional resources by regularly updating the website, distributing informative newsletters, and hosting parent webinars.



## Action Steps

### Goal 3: SMART LEARNING SYSTEMS

*Leverage technologies, specifically Artificial Intelligence, to enhance data-driven decision-making, automate routine operational processes, and provide personalized learning pathways for students, thereby establishing scalable systems that ensure long-term sustainability, promote academic growth, and increase operational efficiency.*

Strategy A: Evaluate, integrate, and optimize technology to streamline and automate operational processes and procedures.

Strategy B: Implement AI-driven personalized learning strategies to maximize student learning.





## Goal 3: Smart Learning Systems

2023-24	2024-25	2025-26
<p><u>Evaluation/integration team</u> Build a technical team consisting of designated members from the IT Department</p>	<p><u>Evaluation/integration team</u> Introduce quarterly review meetings to assess progress, challenges, and future steps.</p> <p>Develop a new job description for an individual who will maintain integrations, the user portal, custom tools, and data lake developments once they are launched</p>	<p><u>Evaluation/integration team</u> Maintain quarterly review meetings to assess progress, challenges, and future steps.</p>
<p><u>Systems audit</u> Interview all Sage Oak departments to understand school-wide systems</p> <p>Gain administrative access to all systems</p> <p>Understand what information flow exists for each system, identifying dependent and independent data</p> <p>Understand what work is being done on each system and how is it completed and documented</p> <p>Understand the reason systems are not fully used</p>	<p><u>Systems audit</u> Ensure effective cross-platform communication, enabling different systems to interact seamlessly to fill in gaps discovered by the audit</p> <p>Identify all data bridges between platforms</p> <p>Evaluate reducing systems used</p> <p>Train staff on elements of systems underutilized</p>	<p><u>Systems audit</u> Establish subject matter experts from each department to act as the support person for department tools and the Sage Oak user portal. These experts will serve as the first point of contact for support, ensuring ownership and accountability for maintaining updated information and ensuring systems run efficiently.</p> <p>Identify underutilized systems and determine if issues stem from system limitations or training gaps. Phase out ineffective systems and provide training where needed.</p> <p>List all organizational and educational platforms, categorize users (All School, Department, Role), and survey them on effectiveness, pain points, and improvement needs.</p> <p>Use survey results to refine system usage, address training gaps, and determine if platforms should be improved or replaced.</p>
<p><u>Projects integration and/or optimization</u> Investigate the fiscal efficiency of systems</p> <p>Create user buy-in for any proposed integration and/or optimization</p> <p>Propose to the Director team a list of potential</p>	<p><u>Centralized Management System with Data Lake Integration</u> Develop and deploy a centralized management system (user portal) that provides a single dashboard linking documents and applications based on users' roles and departments. The dashboard will include organization-wide links to systems and applications,</p>	<p><u>Centralized Management System with Data Lake Integration</u> Leverage the central management system to include more content with an emphasis on user acceptance and adoption:</p> <ul style="list-style-type: none"> <li>• Solicit user feedback.</li> <li>• Enhance the user portal based on user</li> </ul>

integration and/or optimization projects and set priorities	serving as a document hub with access to school-wide and departmental manuals and resources.	<p>feedback.</p> <ul style="list-style-type: none"> <li>• Evaluate and update shortcuts based on departmental needs.</li> <li>• Roll out training to address gaps in user knowledge.</li> <li>• Expand Sage Oak data lake to include additional integrations.</li> </ul>
	<p><u>Custom Tool Development</u></p> <p>Design various data integration tools to increase staff efficiency and support data-driven decision-making, accessed through the centralized management system:</p> <ul style="list-style-type: none"> <li>• Student information portal</li> <li>• Teacher-student rostering assistance tool</li> <li>• Special education assessment management system (AMS)</li> <li>• Internal OPS purchase order (PO) data interchange</li> <li>• Budget-to-actual system</li> <li>• Secondary course alias search tool</li> <li>• CalSTRS reporting automation</li> <li>• Community provider (CP) parent and student rating and review page, similar to Yelp</li> </ul> <p>Develop a plan for the future development of various tools:</p> <ul style="list-style-type: none"> <li>• Inventory integration/virtual library</li> <li>• Custom purchasing system to realize savings versus our existing annual subscription, integrating with a virtual library tool.</li> </ul>	<p><u>Custom tool development</u></p> <p>Design various data integration tools to increase staff efficiency and support data-driven decision-making, accessed through the centralized management system:</p> <ul style="list-style-type: none"> <li>• Integrate an online lending library, department inventories, purchasing, and help desk inventories</li> <li>• Create a custom purchasing system to realize savings compared to our existing annual subscription</li> <li>• Launch a process to identify additional tool development opportunities and improve previously designed custom tools based on user feedback</li> </ul> <p>Develop a plan for future development of a Virtual Library to be deployed in 2026-2027.</p>
<p><u>System and Process Documentation</u></p> <p>Collect existing system and process documentation links</p> <p>Create and propose a standardized systems and document hub</p> <p>Establish organization-wide templates and processes to promote consistent operations across all departments, proposing a standardized Standard Operating Procedures (SOP) template to use school-wide</p>	<p><u>System and Process Documentation</u></p> <p>Migrate system and process, including department manuals, to a common hub using organization-wide common templates.</p> <p>Define clear access permissions for staff members and provide necessary training for each system.</p> <p>Create and propose a standardized systems and document hub</p>	<p><u>System and Process Documentation</u></p> <p>Monitor advancements in AI and documentation technology to identify potential upgrades for the Sage Oak ChatGPT and the documentation hub.</p> <p>Develop a roadmap for future enhancements, upgrades, and integrations, ensuring the systems remain cutting-edge and serve the evolving needs of the school</p> <p>Standardize the process for regular updates to documentation, ensuring it remains current and</p>

<p>Explore the development of a Sage Oak ChatGPT, an AI-powered chatbot or virtual assistant, to provide teachers and staff with easy access to information and support.</p> <p>Define the scope and functionalities of ChatGPT to address common inquiries, provide resources, and assist with system-related tasks.</p> <p>Collaborate with technology experts or vendors to develop and implement the Sage Oak ChatGPT effectively.</p> <p>Revisit the "where to go for support" chart and establish subject-matter experts</p>	<p>Establish organization-wide templates and processes to promote consistent operations across all departments, proposing standardized Standard Operating Procedures (SOP) templates to use school-wide</p>	<p>reflective of best practices.</p>
<p><u>AI Program for Students</u> Researching what AI curriculum/schools are out there; build a guiding team/committee</p>	<p><u>AI Program for Students</u> Develop an AI curriculum tailored to the needs of our students. Determine whether to integrate existing AI educational resources, develop our own curriculum, or collaborate with external educational organizations</p> <p>Utilizing the MagicStudent Platform in live synchronous instruction in order to provide a rich learning experience for our students and a streamlined approach to AI for our teachers.</p>	<p><u>AI Program for Students</u> Implement the AI curriculum across selected virtual pilot classes, gathering feedback from students and educators to refine the program.</p> <p>Establish a dedicated AI lab equipped with cutting-edge technology to facilitate hands-on learning experiences.</p> <p>Introduce foundational AI concepts across various subjects and grade levels to enhance students' understanding and interest in artificial intelligence, preparing them for advanced study and future career opportunities in technology.</p>

	<p><a href="#">SageOak.Ai</a></p> <p>Expand the capabilities of the SageOak.Ai portal and the Sage Oak custom chatbots:</p> <ul style="list-style-type: none"><li>● Integrate advanced functionalities for more comprehensive support and feedback</li><li>● Tailor the ChatBots for different departments</li><li>● Partner with AI technology experts to expand upon the AI tools used at Sage Oak</li></ul>	<p><a href="#">SageOak.Ai</a></p> <p>Continue development of <a href="#">SageOak.Ai</a></p> <p>Conduct research on emerging AI models, software updates, and best practices to enhance engagement, streamline support, and improve information delivery.</p> <p>Evaluate and pilot AI features such as automated content creation, real-time user feedback, and data analytics dashboards.</p> <p>Develop a roadmap with timelines for AI enhancements, system integrations, and long-term implementation strategies.</p> <p>Launch the AI curriculum developed in 2024–25 across pilot virtual classes, gather feedback, and refine based on results.</p>
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## ***Conclusion***

As we continue to implement our multi-year strategic plan, the 2025 to 2026 priorities reaffirm Sage Oak's commitment to purposeful, student-centered education. Grounded in our mission and guided by our values—Service, Accountability, Growth Mindset, and Excellence—this year's plan reflects steady progress and thoughtful evolution. We are deepening our personalized learning model, expanding career-connected opportunities, and strengthening systems that empower both students and staff to grow, connect, and thrive.

This year's key initiatives, collectively coined Personalization 2.0, include the Professional Development Passport, Power Standards, Sage Crates, and the integration of AI, demonstrate our continued focus on professional growth, clarity, and innovation. Each strategy is designed not only to meet today's needs but to build a sustainable and future-ready model that supports our learners at every stage.

As we look ahead, we remain committed to listening, learning, and adapting. Our strategic plan remains a living framework that reflects the voices of our students, families, and staff. Together, we are building a system where every student has a customized plan and resources to reach their full potential and lead lives of purpose, impact, and possibility.



# Coversheet

## AI Master Plan

<b>Section:</b>	XI. Oral Presentations
<b>Item:</b>	C. AI Master Plan
<b>Purpose:</b>	
<b>Submitted by:</b>	
<b>Related Material:</b>	AI Master Plan_8.14.2025.pdf

# A Strategic and Inclusive Approach to AI

Presenters: Traci King & Brad Bookser

Audience: Sage Oak Board of Directors

Date: August 2025



# Why This Matters



## Educational Strategy

AI is an educational strategy, not merely a tech tool.



## Collaborative & Lasting

Collaborative approach for sustained, long-term community impact.



## Student-Centric Principles

Emphasis on student protection, inclusion, and innovation.



# Why AI? Why Now?

## Our Moment to Lead



- California Department of Education guidance
- Future-readiness and digital literacy as core skills
- Preparing students for college, career, and citizenship in an AI world

# Policy, Privacy & Guardrails

## Laying a Safe Foundation

Drafted AI Policy + Acceptable  
Use Guidelines

Based on CDE/District models

Student data protection and  
transparency emphasized

# AI Policy

Our commitment includes:



## Equity and Accessibility

Accessible AI tools for all learners.



## Privacy and Security

Strict privacy, security, and data compliance (FERPA, COPPA, U.S. storage).



## Transparency

All AI-generated work labeled and cited by students and staff.



# Acceptable Use Policy

## Daily Guidelines for AI

### ✓ Approved Uses

Teachers/staff: drafting lessons, summarizing, creating materials, translating.

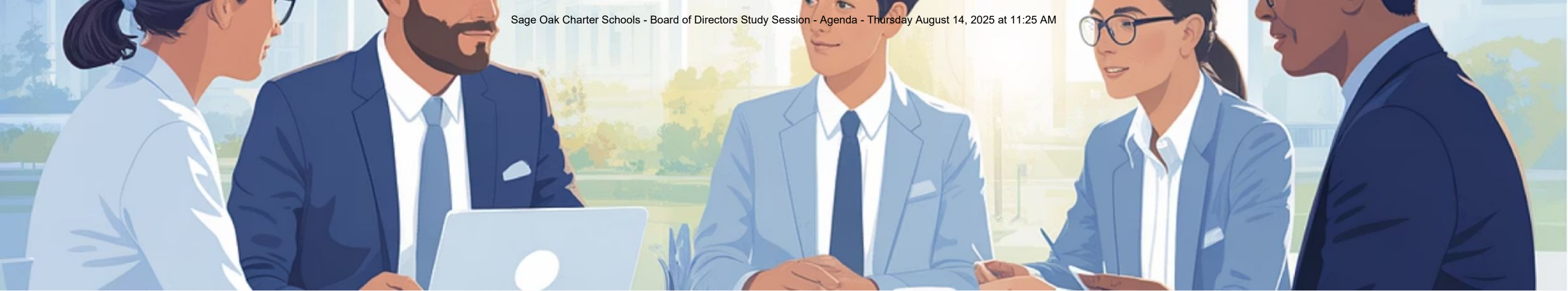
Students (with teacher permission): brainstorming, practicing skills, feedback on drafts.

All student AI use is opt-in and teacher-guided.

### ✗ Not Permitted

- Entering student PII into AI tools.
- Using AI without permission for assignments.
- Any use leading to plagiarism or harmful content.





# Discussion Pause #1 (2-3 min)

## Let's Hear from You

☐

Are we addressing your concerns about privacy and policy upfront?

☐

Anything unclear in how we're framing this work?

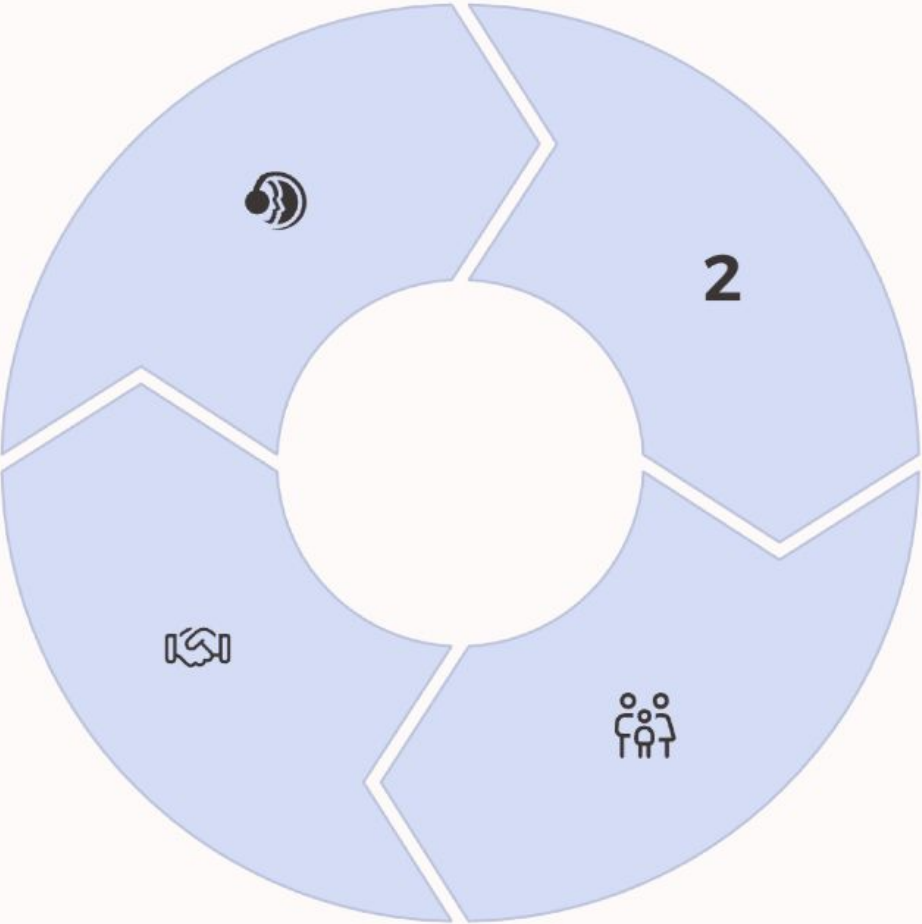


# A Collaborative Process

## Designed with Community Input

**AI Committee**  
Directors, Teachers, Support Staff

**Outside Consultant**  
External expertise and guidance



**Leadership**  
Direction set by instructional leaders

**Parent Engagement**  
Learning sessions: "AI Literacy, Learning About AI"

# Supporting Educators

## Empowering Our Teachers



# Goals & Principles

## Our North Star

Goals	Principles	Equity Example
Improve learning, protect students, align with CDE	Privacy, transparency, accessibility, equity, and choice	Providing coaching or alternatives for students who need it



# Timeline & Board Partnership

## Measured and Phased Approach



# Q3 projections



## Discussion Pause #2

### Reflections So Far



Questions on timeline, equity, or staff support?



Are we aligned in our long-term vision?

# What We Are Not Doing

## Clarity on Limits

**No AI in K-2**

Protecting our youngest learners

**No SEL/MTSS  
Assessments**

Not using AI for social-emotional  
evaluations

**No Required Use**

Student use of AI tools is optional

# Student Use Cases

## Empowering Learners



### Ideation

Brainstorming, feedback, organization



### Academic Support

Study support, career and college prep

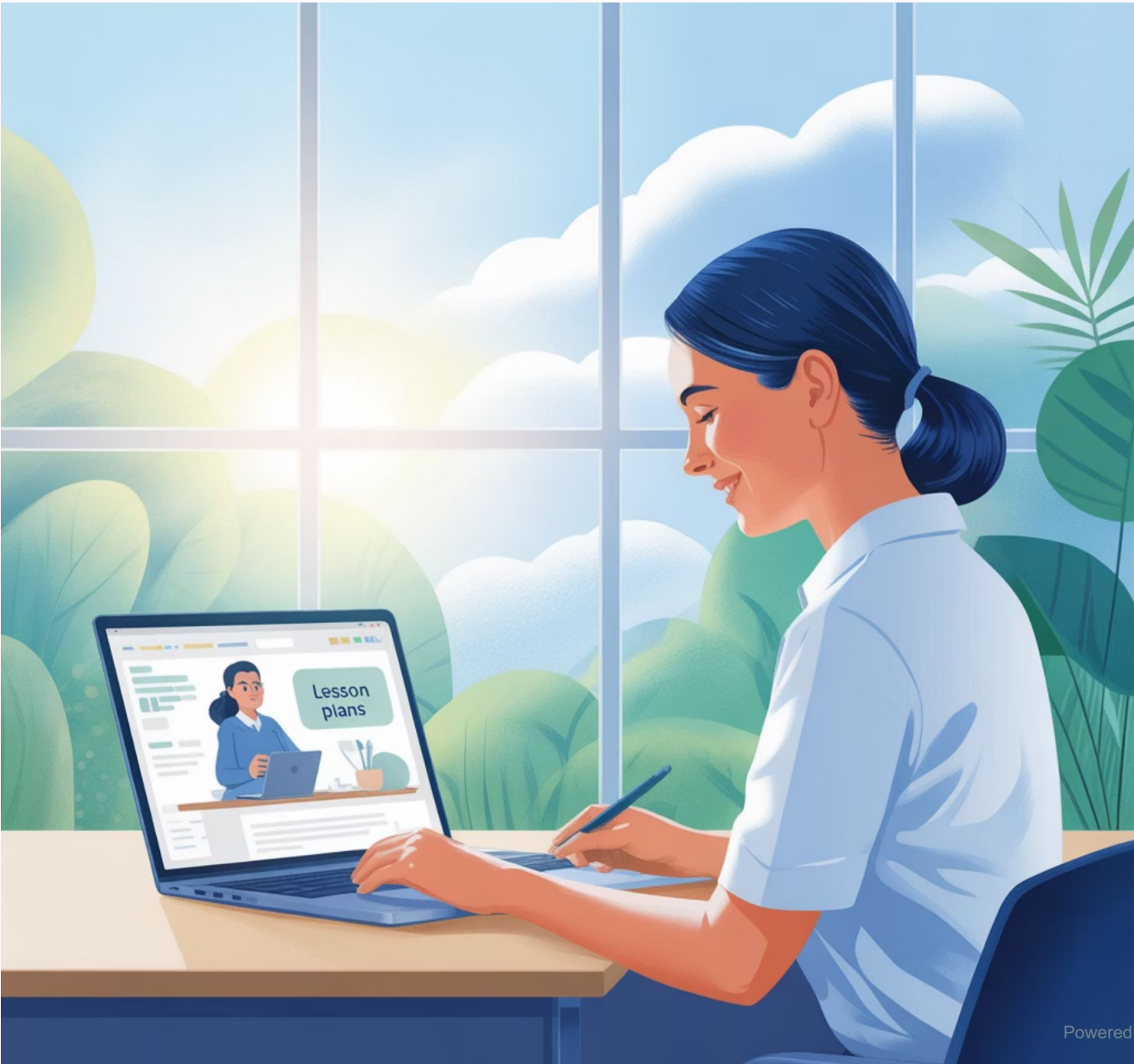


### Scaffolded Learning

Opt-in experiences with guidance

# Educator Use Cases

## Reducing Admin Load



- Rubric generation, summarization, translation
- Communication templates
- Freeing time for deeper teaching

# Family & Student Choice

## Respecting Individual Decisions

### Opt-In Participation

Families choose whether to participate

### Transparency

Clear communication and parent control

### Initial Adoption

~50% of families may initially opt out



# Strategic Visioning Session



## Discussion Pause #3

### Final Thoughts



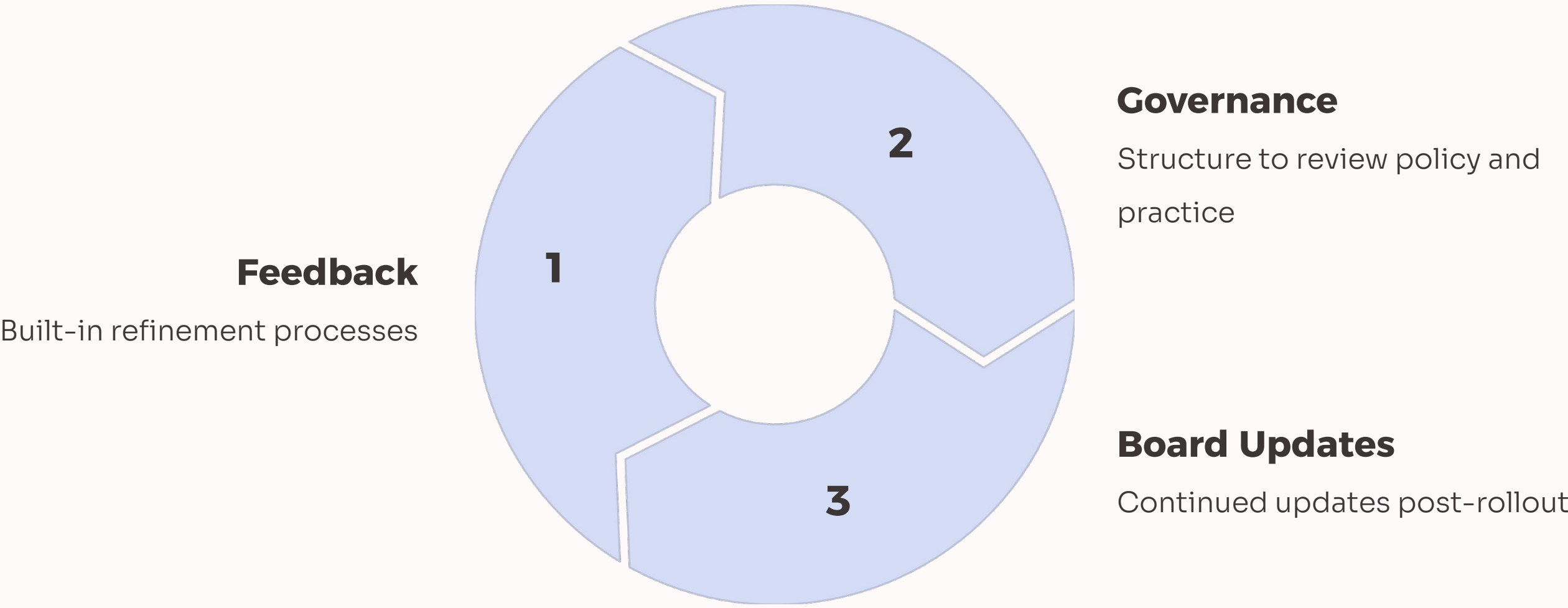
Are we balancing innovation with community values?



Do you see this approach as sustainable and inclusive?

# Ongoing Growth & Governance

## A Living Strategy







# Closing & Q&A

## Your Support & Next Steps

This strategic and phased plan is built with your input and collaboration. We are now seeking your support to move forward with an August 2025 launch.

 What are your final questions or insights?

 Are there any conditions you would like us to build into the next phase?

# **Thank You!**

## **Questions & Discussion**

