Sage Oak Charter Schools

Board of Directors Study Session

Published on April 3, 2026 at 10:35 AM PDT

Date and Time

Thursday April 9, 2026 at 10:05 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

Link to Join Zoom Meeting
ID: 95469287673
Passcode: 903590

Dial In: (US) +1 646-931-3860
Passcode: 903590

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

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 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
I.	**Opening Items**			**10:05 AM**
A.	Call the Meeting to Order		Board President	1 m
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			
II.	**Pledge of Allegiance**			**10:07 AM**
A.	Led by Board President or designee		Board President	1 m
III.	**Approve Agenda**			**10:08 AM**
A.	(Action) Approval of Agenda for April 9, 2026 Board of Directors Study Session	Vote	Board President	1 m
	It is recommended the Board approve the agenda for the April 9, 2026, 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. 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) 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.

V. Oral Presentations — 10:09 AM

A.	AI at Sage Oak		Krista Woodgrift	45 m

Brad Bookser, Director of Information Technology
Carleen Maurer, Director II, Student Learning and Innovation

VI. Calendar

The next scheduled meeting will be a Regular Board of Directors Meeting held on May 14, 2026.

VII. Comments — 10:54 AM

A.	Board Comments			2 m
B.	Superintendent Comments			2 m

VIII. Closing Items — 10:58 AM

A.	Adjourn Meeting	Vote	Board President	1 m

Roll Call Vote:

	Purpose	Presenter	Time

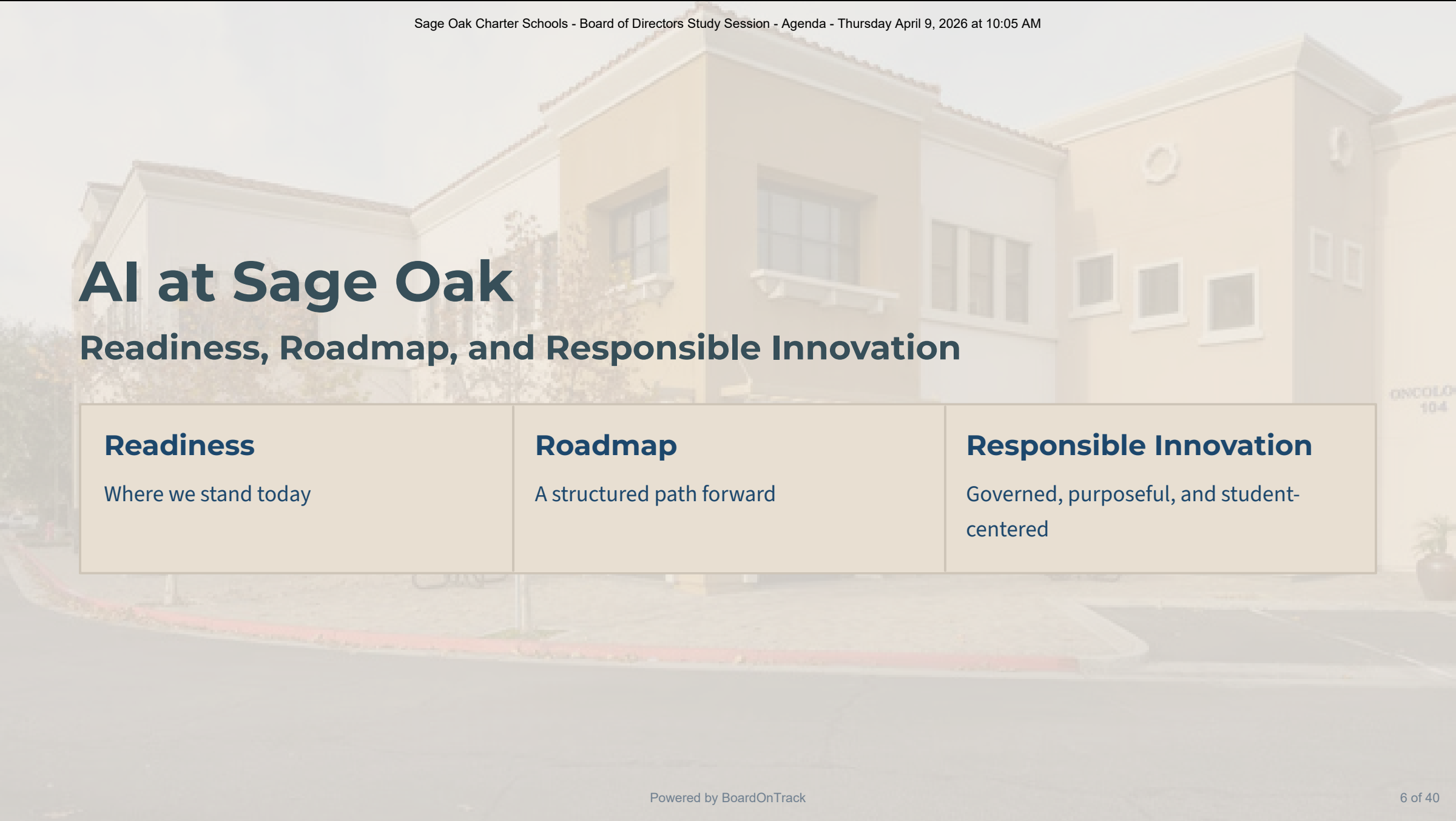
William Hall
Michael Humphrey
Steve Fraire
Susan Houle
Peter Matz
Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

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

Coversheet

AI at Sage Oak

Section: V. Oral Presentations
Item: A. AI at Sage Oak
Purpose:
Submitted by:
Related Material: AI at Sage Oak Presentation.pdf



AI at Sage Oak

Readiness, Roadmap, and Responsible Innovation

Readiness	Roadmap	Responsible Innovation
Where we stand today	A structured path forward	Governed, purposeful, and student-centered

SECTION 1: FOUNDATION

Purpose of Today's Session

1

Where We Stand

State of AI at Sage Oak — what's working, what's next

2

External Validation

Dr. Moore's readiness assessment confirms our direction

3

Clear Roadmap

Structured path forward with defined milestones

4

Balanced Approach

Innovation, governance, and capacity in harmony

What We Want You to Leave With

Confidence

Our direction is sound, strategic, and externally validated

Excitement

Real opportunities to transform learning and operations

Clarity

Risks are understood, governed, and actively managed



CHALLENGE

The Challenge with AI

AI touches every dimension of what we do — instruction, operations, and systems infrastructure.

Without clear structure, ownership blurs and risk compounds. Ambiguity is where harm happens.

Our Solution: Two Lanes, One System

🎓 Student Learning Lane

AI-supported instruction, personalization, and learning outcomes — led by Student Learning and Innovation

⚙️ Operational Lane

Systems, safety, governance, and efficiency — led by IT in partnership with Educational Services

Two distinct lanes. One unified strategy. Clear ownership at every level.



Why Two Lanes Matter

Clear Ownership

Every decision has a defined owner and accountable team

Organized Decision-Making

Structured process prevents ad-hoc, unvetted tool adoption

Compliance & Risk Management

Governance built in from the start, not retrofitted later

Scalable Growth

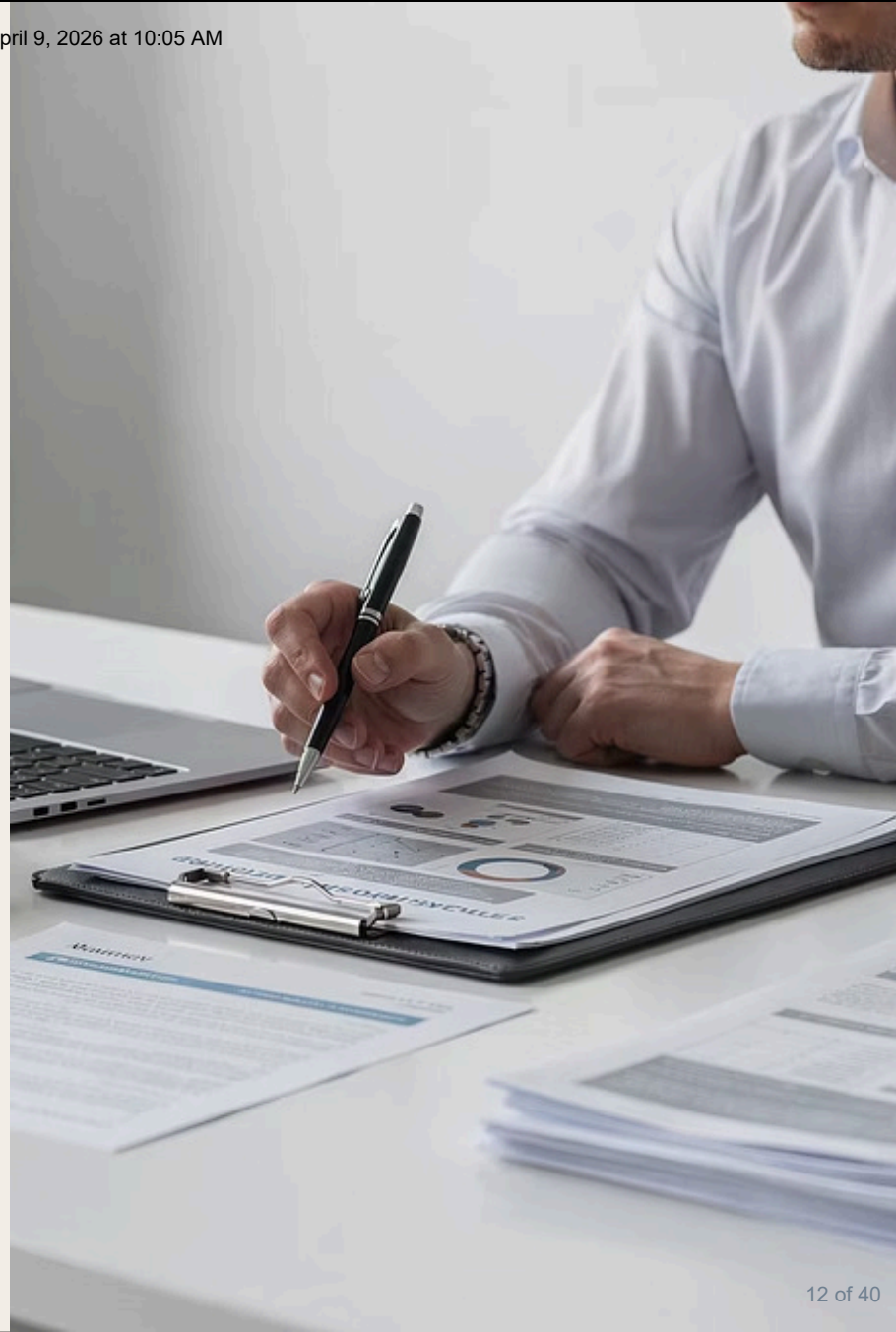
A framework designed to expand sustainably as AI evolves

EXTERNAL VALIDATION

External Validation

Dr. Moore's AI Readiness Assessment provides independent confirmation that Sage Oak is building on a strong foundation.

- Confirms strong foundation and culture of innovation
- Aligns with current state guidance and frameworks
- Provides a clear, actionable strategic roadmap



We Are Already in Motion

1

AI Policy

Active policy development underway

2

Systems Audit

Comprehensive platform review in progress

3

Staff Training

Tool rollout and professional development launched

4

Board Learning

AI literacy sessions for board members initiated

Discussion

- **Your Reactions**

  What resonates about the two-lane model? What questions does it raise?

SECTION 2: STUDENT LEARNING LANE

Student Learning Lane

Led by Student Learning and Innovation —guiding the design and integration of AI-supported learning, personalized tools, and practices that strengthen, not replace, student thinking.

AI-Integrated Teaching & Learning

Building a shared foundation for how AI is used responsibly and effectively in instruction

Human-Centered Approach

Tools that amplify human thinking and teacher expertise



Current Instructional Work

Magic School

Full rollout in progress — teachers actively using for planning, differentiation, and resource creation

Brisk Teaching

Early-stage implementation with select staff — promising initial results

Ongoing Evaluation

Continuous tool review centered on process to ensure alignment with student outcomes



What We Are Hearing

Student Voice Tour

Students report curiosity and engagement when AI tools are introduced with clear purpose and context

Teacher Surveys

Educators value time savings on prep and differentiation — and want more structured guidance

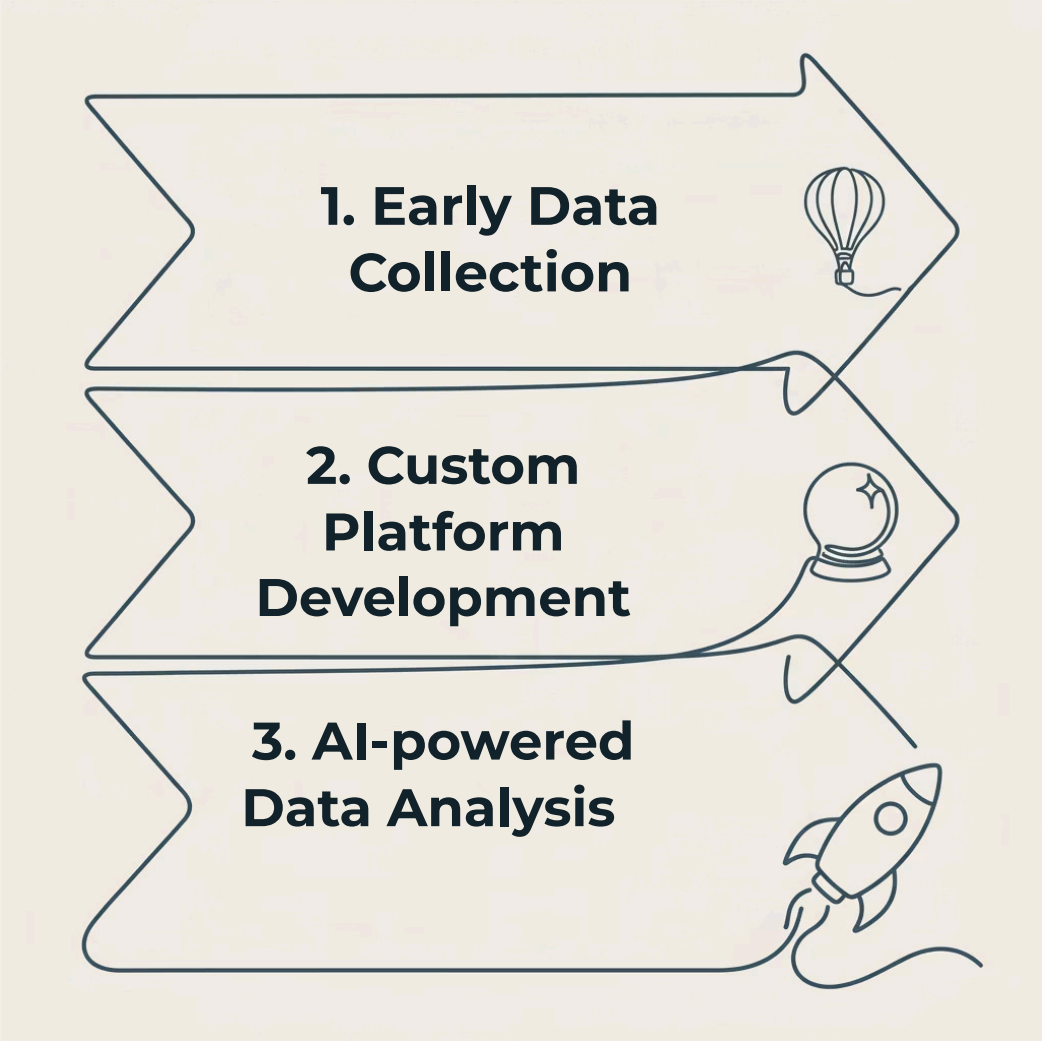
Early Trends

Higher engagement observed when AI tools support — rather than shortcut — the learning process

Connecting AI to Outcomes

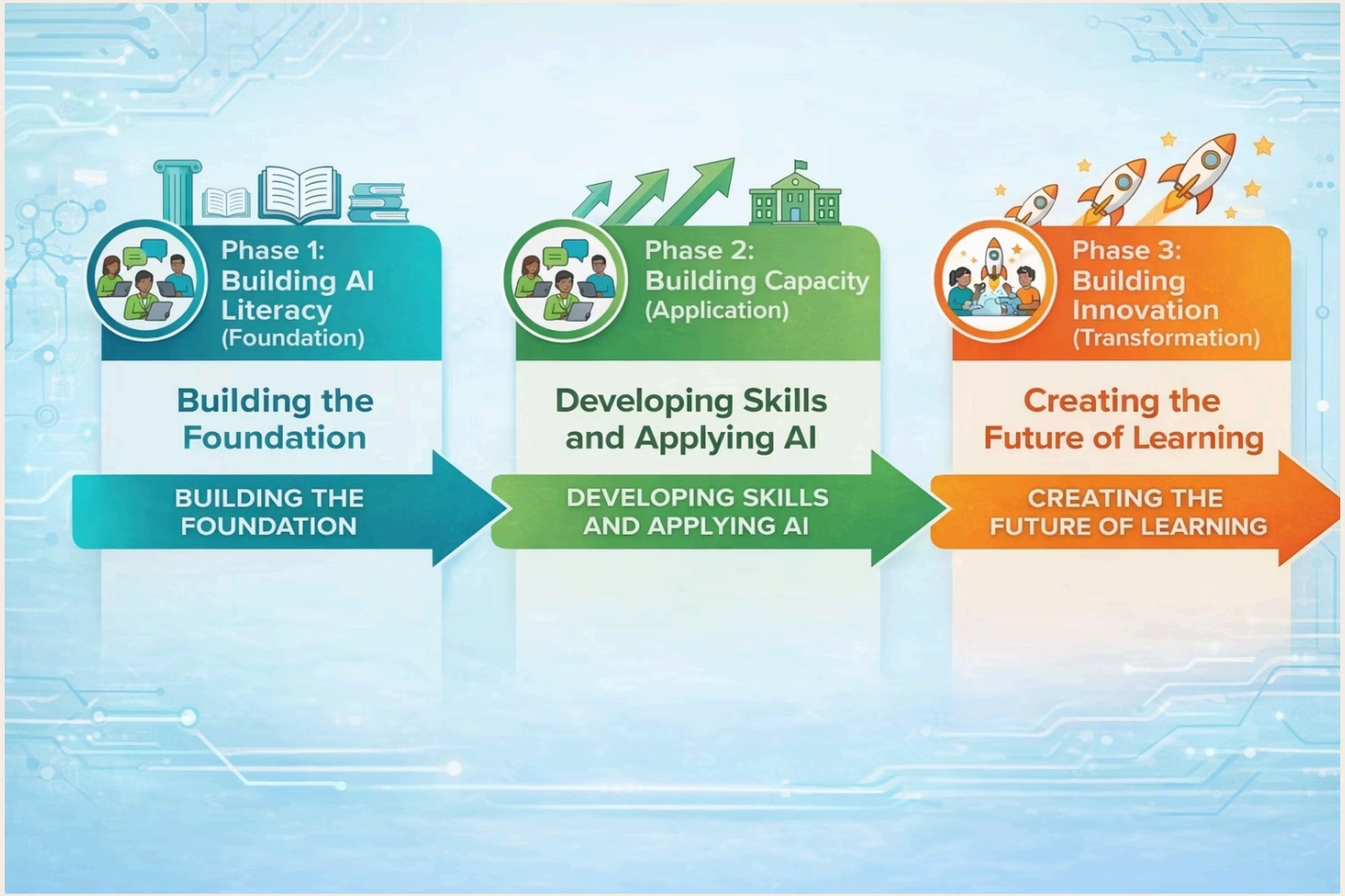
Impact must be measurable.

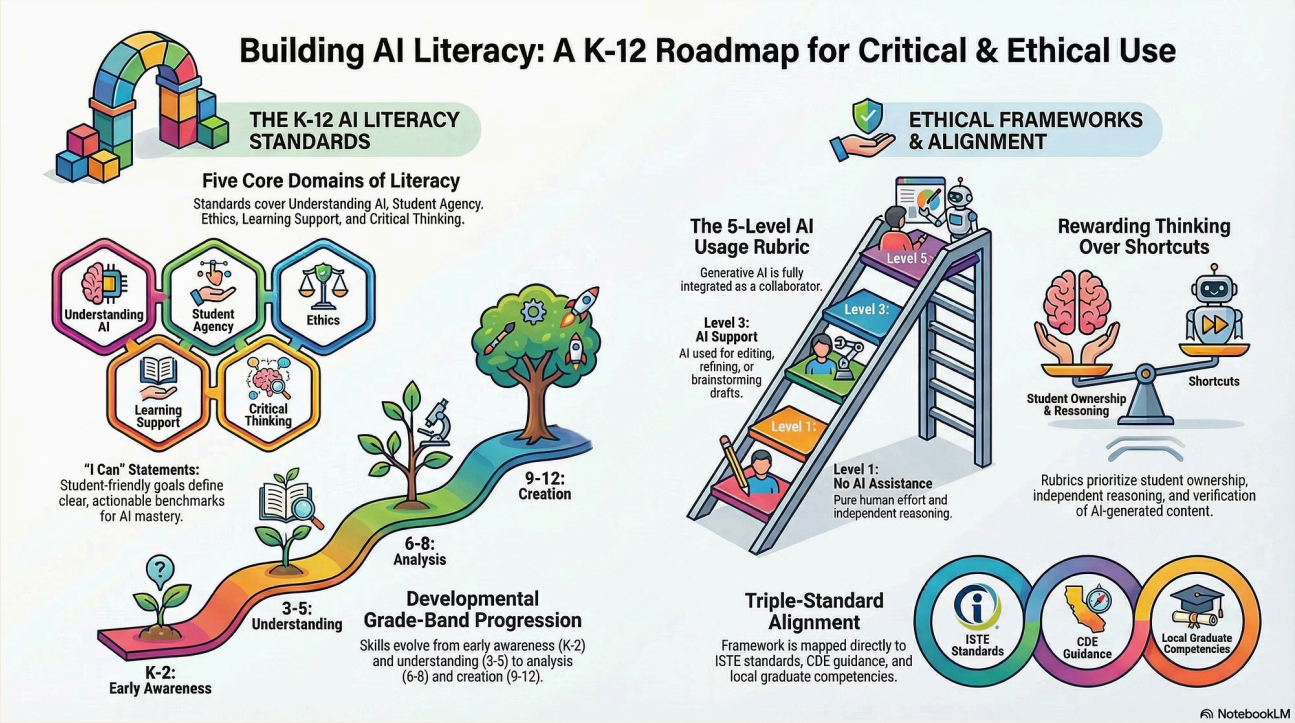
We are building the data infrastructure to know what's working.



Looking Ahead - Student Learning Lane

Advancing Student Achievement Through a Phased Approach to AI-Integrated Learning





Phase 1: Building AI Literacy

- Define student AI literacy standards for each grade band
- Develop usage rubrics that reward thinking over shortcuts
- Align frameworks with emerging state guidance

Phase 2: Building Capacity

Equip educators and families with the training, resources, and tools needed to meaningfully integrate AI into instruction and support student learning.

Educator Professional Learning

Parent Education

Student Voice & Choice



Phase 3: Building Innovation

Leverage AI to enhance personalized learning, develop internal tools, and design more rigorous, future-ready learning experiences and assessments.



Personalized Learning

AI-driven experiences that adapt to each student's pace, strengths, and needs across subjects and grade levels



Internal Tool Development

Custom-built platforms and systems that give Sage Oak unique capability to track, analyze, and improve outcomes



Future-Ready Assessments

Reimagined assessments that measure deeper thinking, creativity, and real-world application



Rigorous Learning Design

Curriculum frameworks that integrate AI as a thinking partner, not a shortcut

Continuous Improvement throughout each Phase

Evaluate

Assess each tool's impact on student learning outcomes



Refine

Remove tools that underperform; deepen investment in what works

Align

Ensure every tool ties directly to measurable student outcomes

Our edtech ecosystem is not static — it is built to evolve with evidence.

Discussion

- **AI-Integrated Teaching and Learning**

  What questions do you have about how we plan to infuse AI into teaching and learning?

SECTION 3: OPERATIONAL LANE

Operational Lane Overview

Led by IT in partnership with Educational Services — ensuring every AI tool is safe, vetted, and purposeful.

Systems

Infrastructure that supports and scales AI adoption

Safety

Data privacy and student protection are non-negotiable

Governance

Policy-aligned oversight of all AI tools and platforms

Amazon Web Services (AWS)	Cloud computing platform	IT	1	District License	$51,997.44	Yes	IT
Amira Learning	AI reading assistant	Assessment	115	115	$32,000	Yes	O&
Articulate 360 AI	E-learning design software	EdTech	2	2	$2,748	Yes	IT
AspireEDU - Grade Guardian	Grade monitoring tool	EdTech	2000	NA	$8,000	No	IT
AVID Center	College readiness program	Digital Curriculum	3	District License	$4,739	No	High S
Barracuda	Cybersecurity and data prot...	IT	3	3	$1,305.45	Yes	IT
BarTender Professional Edition	Barcode label software	IT	2	2	$1,780	No	IT
BigQuery	Scalable data analysis	IT	1	District License	$0	Yes	IT

Systems Audit

A comprehensive review of every platform currently in use — to reduce clutter and clarify capability.

Review All Platforms

Full inventory of tools in use across departments

Reduce Redundancy

Eliminate overlapping tools that fragment staff experience

Identify AI Capabilities

Surface AI features already embedded in existing tools

Standardize Tools

Fewer, better tools used consistently and with support

Governance Framework



Board-Aligned Policy

AI use governed by board-approved policies and direction



Vendor Vetting

Structured process to evaluate tools before adoption



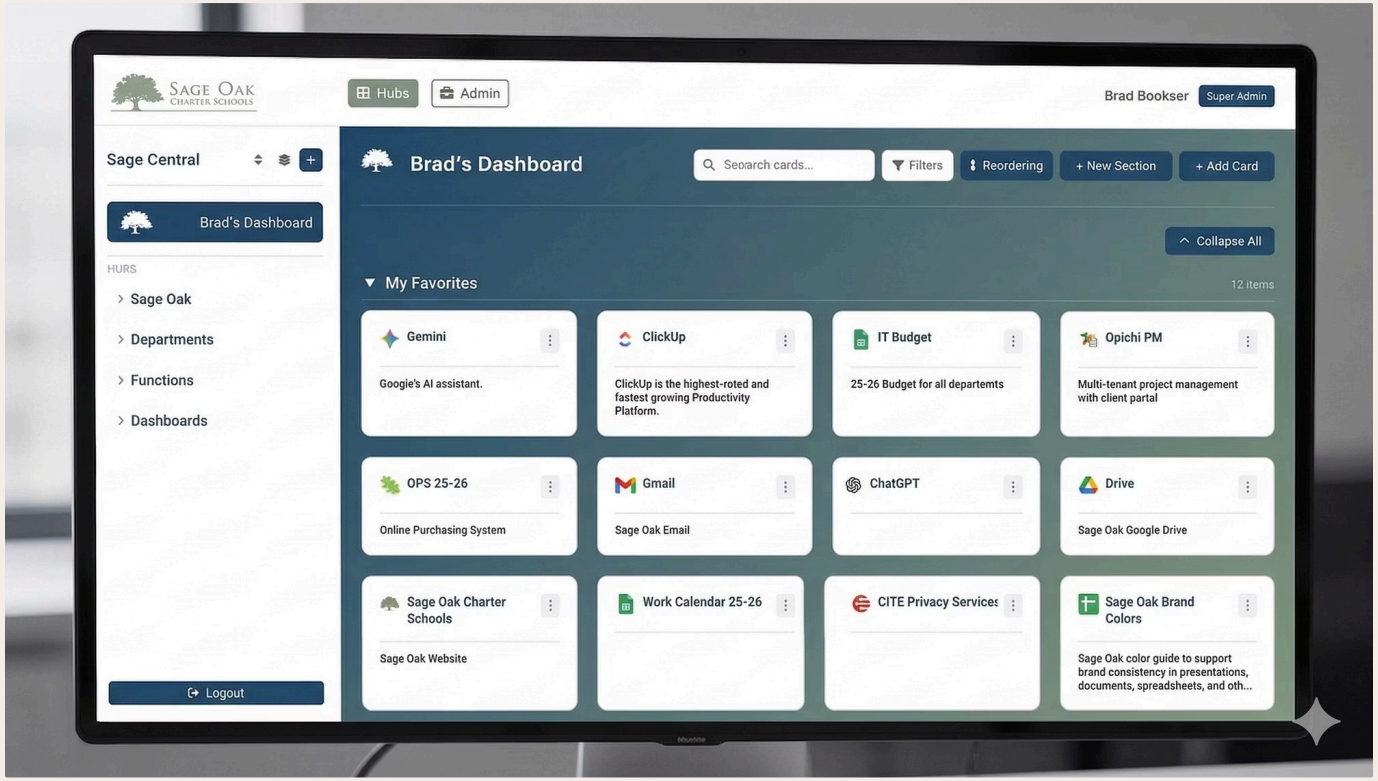
Data Privacy

Student data protections built into every tool decision



Usage Boundaries

Clear, communicated limits on how AI may — and may not — be used



Sage Central

One trusted destination for all approved AI tools — making the right choice the easy choice.

Single Hub

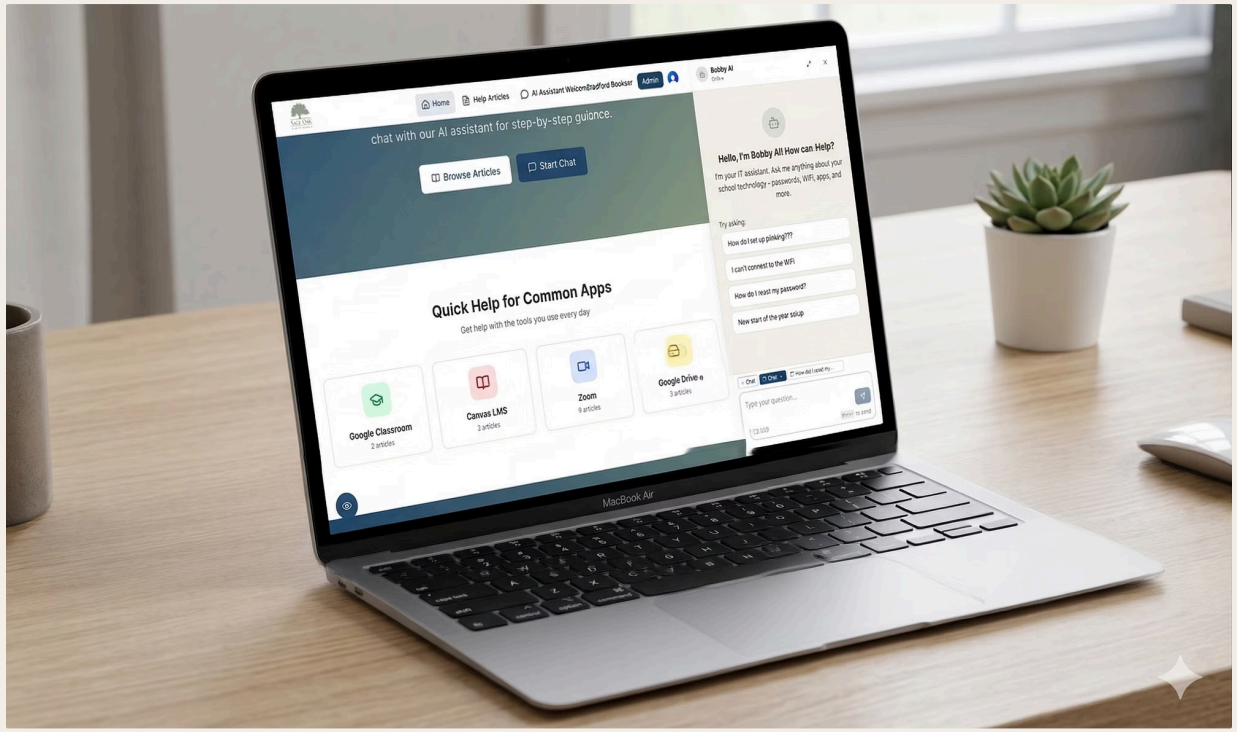
All vetted, approved tools in one accessible location

Easy Staff Access

Reduces friction and confusion around which tools to use

Guardrails Built In

Unapproved tool use is naturally discouraged by design



IT Help, Made Easy

Get instant answers to your tech questions. Browse our knowledge base or chat with our AI assistant for step-by-step guidance.

iThelp.SageOak.Systems

New IT Support Portal

iThelp.SageOak.Systems — designed to make finding help for common IT issues fast and easy

Integrated AI Support Bot

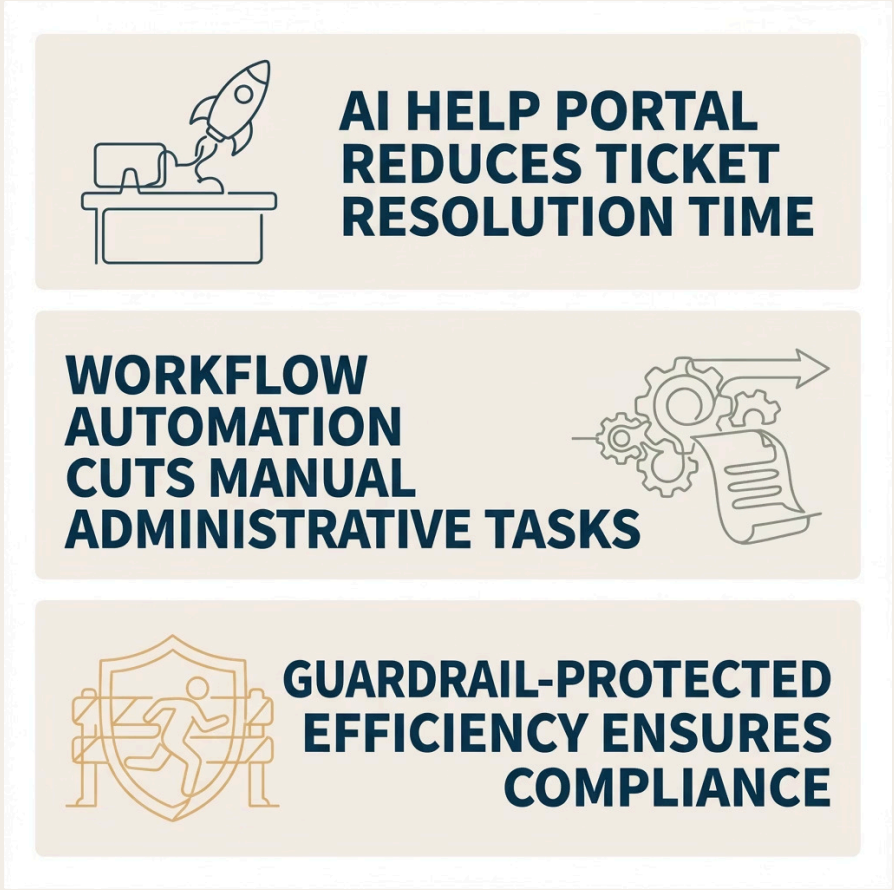
Chat with an AI assistant for instant, step-by-step guidance on tech questions

Knowledge Base

Browse curated resources and solutions built for Sage Oak staff and systems

Operational Impact

AI is already improving how we work — with guardrails that ensure it serves our mission.



AI-Powered IT Help Portal

Faster resolution of staff support requests

Workflow Automation

Reducing manual tasks across operations and administration

Efficiency with Guardrails

Productivity gains that never compromise safety or compliance

Discussion

- **Data Privacy**

  What questions remain about how student data is protected across AI-enabled platforms?



SECTION 4: PACING & STRATEGY

Why Pacing Matters

> AI adoption must match our capacity to implement it well — not just our enthusiasm to adopt it fast.

Capacity Considerations



Staff Readiness Varies

Comfort with AI tools differs widely across roles and experience levels



Limited Training Time

Professional development must be focused, not overwhelming



Family Preferences Differ

Parents hold a range of views on AI in education — communication matters



Ongoing Support Needed

One-time training is not enough — continuous reinforcement builds lasting confidence

AI Implementation Overview: Two-Lane Strategy Across Phased Approach

This phased approach advances both operational efficiency and student learning in parallel.

Phase	🏢 Staff: Operations & Efficiency	🎓 Students: Teaching & Learning
Phase 1: Building AI Literacy ***(Foundation)***	• Develop AI literacy across staff • Introduce approved AI tools • Establish responsible AI use expectations	• Define K–12 AI literacy expectations • Teach responsible use and integrity • Position AI as a learning tool
Phase 2: Building Capacity ***(Application)***	• Streamline workflows with AI • Provide targeted professional learning • Increase efficiency with human oversight	• Expand AI-integration educator training • Engage families in understanding AI-supported learning • Elevate student voice through AI projects and choice
Phase 3: Building Innovation ***(Transformation)***	• Leverage AI for insights and automation • Develop internal AI tools • Enable AI-informed decision-making	• Design AI-integrated learning experiences • Transform assessment for authentic work • Expand AI-supported personalization

Focus on What Matters Most

Prioritize High Impact

Direct resources toward initiatives with the clearest student and operational benefit

Use Data to Decide

Evidence — not enthusiasm — drives which tools we invest in

Do Fewer Things, Better

Depth of implementation beats breadth of adoption every time



Discussion

- **Pacing Perspective**

  Do you have any questions about our current pacing approach?

SECTION 5: CLOSING

Two Lanes, One Strategy

Student Learning Lane

AI that personalizes, supports, and enriches instruction — always anchored to student outcomes



Operational Lane

Systems, safety, and governance that make innovation accesable, sustainable and trustworthy

Innovation and guardrails are not in tension. At Sage Oak, they are designed to work together.

Key Takeaways

Already in Motion

Tools deployed, audits underway, policy development active

Building with Clear Guardrails

Governance, vetting, and data privacy are foundational — not afterthoughts

Pacing for Long-Term Success

A measured, multi-year strategy built to grow with our capacity and our community





Our Commitment

Confident and Forward-Thinking

We are building something that Sage Oak — students, families, and staff — can be proud of

Focused on Student Success

Every AI decision traces back to one question: does this help students learn and thrive?

Committed to Responsible AI

Innovation guided by values, governance, and an unwavering commitment to doing it right

Final Questions and Discussion

This is your time. We welcome every question, challenge, and perspective from the board.