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Executive Summary

HISTORY

Founded on the guiding principle of "what is good for gifted students is good for all students," The Academies Charter Management Organization (TACMO) operates two kindergarten through eighth grade public charter schools in Visalia, California. The two schools, Sycamore Valley Academy (SVA) and Blue Oak Academy (BOA), collectively serve over 540 students and employ over 75 teachers and staff.

Recognizing gaps in access to gifted and talented support in the public education system, TACMO's flagship school, SVA, opened in 2012 to provide students and families with a unique, high-quality public school option emphasizing the core tenets of gifted education for all students: depth and complexity, acceleration and novelty, critical thinking and inquiry.

Following the establishment of SVA, the organization engaged in its first strategic planning process in 2015-16 to explore opportunities to scale its model in order to be accessible to more students, particularly those who have been historically underserved by the public education system. The addition of Blue Oak Academy (BOA) in 2017 expanded SVA's impact in number of students served and increased the capacity of the organization overall.

TACMO TO-DATE

In its first two years of operating as a two-site charter management organization, TACMO experienced challenges: serving a more diverse student population resulted in a wider range of student needs, increasing the complexity of delivering the academic model, while an expanded staff varied in their understanding of gifted education philosophies and strategies, the organization's leaders debated possible growth opportunities, and the TACMO community wondered how the organization would function without its founding leader.

In the 2018-2019 school year, the organization engaged in its second strategic planning process focused on creating a five-year plan inclusive of both sites, future growth opportunities, and identifying priorities to support leadership succession.

2019-2024 STRATEGIC VISION

Over the next five years, TACMO will hone its academic model to support all learners, deepen the personal development of students, and continue to inspire change in the public education system locally and nationally.

The organization's core goals to be achieved by 2024 are focused on:

- ◇ Delivering its founding academic model (gifted and talented education for all) with appropriate adaptations and supports for diverse learner needs;

- ◇ Inspiring students to explore their interests and solve real-world problems in their classrooms, on campus, and in their communities;
- ◇ Sustaining and supporting all staff to develop their professional practice;
- ◇ Connecting parents with needed resources, support, and exciting opportunities to enhance learning for their student and the TACMO community; and
- ◇ Managing an organization that has the talent, resources, and quality of facilities to deliver its unique model and inspire public education reform.

STRATEGIC PLAN IMPLEMENTATION

The 2019-2024 strategic plan was created in partnership with the TACMO community. In-depth stakeholder surveys, an organization-wide strategic planning session with all staff, and a diverse committee of internal and external stakeholders generated the core content of the plan (Strategic Planning Committee roster, pg. 43).

As a result of the strategic planning process, over the next five years SVA and BOA will be working towards the same collective outcomes (i.e. core goals, pg. 5), utilizing a similar approach (i.e. key strategies), and leveraging site-specific action steps (i.e. tactics). The behaviors and actions of the TACMO Community will also be reinforced by the founding Mission and Vision statements (pg. 3), and the newly created Core Values (pg. 4).

The revised Theory of Change (pg. 42) will strengthen internal strategic decisions and supplement external communications; a comprehensive SWOT Analysis (pg. 31) provides useful comparison data as the organization implements the strategic plan and builds from core strengths, addresses weaknesses, leverages opportunities, and mitigates threats.

Finally, it is expected that the new Superintendent will work in partnership with leadership and staff to continuously improve and generate annual action plans (i.e. Year 1 Action Plan, pg. 6) aligned to the strategic planning framework.

TACMO will know it has been successful in strategic plan implementation if the following evidence is present:

- ◇ All students demonstrate growth toward mastery of academic standards;
- ◇ All students are supported to develop their interests and impact positive change;
- ◇ All staff are enthusiastically progressing towards professional development goals and along their individualized career pathways;
- ◇ Parents are actively involved in their child's education, contributing to the life of the school, and connected to the broader organization; and
- ◇ The TACMO organization is financially sustainable, recognized locally and nationally for its accomplishments, and an integral part of the community.

Mission

We provide a rich, meaningful education in a nurturing environment, where students are continually challenged and their natural curiosity, creativity, and talents can thrive. We are a collaborative community of educators and families working together to help our students grow into virtuous, courageous, and intelligent citizens, equipped with a love of learning and a love of life, and eager to contribute to a better world.

Vision

TACMO models transformative change in education by elevating expectations of learning and growth. With grit, tenacity, and empathy, we improve the world around us by embracing challenges as problem-solvers. We create an inclusive community with access to rigorous and enriching educational experiences that challenge and support individuals to achieve their personal best and realize new opportunities.



Core Values



Integrity

We are all empowered to be independent thinkers and leaders who act on behalf of the greater good and consistently uphold our Honor Code.

Individuality

We promote individual strengths and respond to individual needs in order to nurture growth, self-confidence, courage, and resilience.

Inclusivity

Everyone is safe in our community; we celebrate and respect each other's differences and learn in cooperation with one another.

Inquiry

We challenge each other to think critically and creatively to explore, problem solve, and encourage new ideas.

Innovation

We generate and share solutions to reform public education through reflection, research, collaboration, and an unwavering belief in every person's ability.

2019-2024 Strategic Priorities

Over the course of the next 3-5 years, TACMO will direct its capacity and resources towards three main objectives:

- ◇ Fulfill our charter's promise of "gifted education for all" serving a diverse student population
- ◇ Develop students to become adults who change the world
- ◇ Influence and inspire the broader education landscape



Core Goals

- 1** | All students participate in deep instruction with appropriate support and demonstrate academic growth and achievement.
- 2** | All students are engaged by connecting their interests and learning to develop awareness of self, community, and world.
- 3** | Teachers, staff, and administrators are supported and empowered to continuously improve their practice for the benefit of themselves, their students and the greater public education system.
- 4** | TACMO operates as a hub of resources, support, and opportunities for its families and greater community.
- 5** | TACMO is thriving and is recognized as a sustainable public education institution.

2019-2020 Year One Action Plan

Core goals are realized through the implementation of key strategies (i.e. high-level initiatives) and tactics (i.e. day-to-day action steps). Annual action plans include priority strategies and tactics, leadership, resource allocation, and key metrics for monitoring performance.

| GOAL 1 | All students participate in deep instruction with appropriate support and demonstrate academic growth and achievement | | |
|---|---|---|--|
| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 1.1. Revise and refine instructional frameworks K-8 | 1.1.1. Create vertical alignment in curriculum K-8 benchmarks/milestones (e.g. "SVA K-8 experience"); manage by grade levels to ensure transparent grade level expectations and learning benchmarks | <ul style="list-style-type: none"> ◇ Scheduled meeting times to work align ◇ # of standards assessed per PBL ◇ Vertically aligned learning maps for Math and ELA with common formative assessments indicated <ul style="list-style-type: none"> ◇ Standard formative assessment (Year 1) ◇ Complex projects addressing multiple standards (Year 2-3) ◇ Improved MAP/CAASPP scores over time (Year 2) | <ul style="list-style-type: none"> ◇ Superintendent ◇ Principals ◇ Coaches ◇ Grade Level Teams |

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| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 1.2. Increase effective instruction and assessment | 1.2.1. Invest time and/or resources in standards-based trainings (e.g. unpack standards, TCOE workshops, The Standards Institute) 1.2.2. Generate and Bank more resources for lesson planning and scaffolding strategies (including anchor/model resources) 1.2.3. Analyze current formative assessments (including PBL outcomes) and understand key standards 1.2.4. Refine rubrics and assessments, including PBL outcomes (Year 2) 1.2.5. Improve portfolio assessment (Year 2) 1.2.6. Calibrate assessments for ELA and math (Year 2) 1.2.7. Train and then plan content and language objectives (Year 2) 1.2.8. Incorporate structured strategies for student engagement strategies, check-for-understanding, and visible learning into every lesson (Year 3) | ◇ Staff time for assessment collaboration and analysis allocated in calendar ◇ Evidence of differentiated instruction in teacher observations ◇ Standards assessed per trimester/PBL identified | ◇ Superintendent ◇ Principals ◇ Coaches ◇ Grade Level Teams |

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| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 1.3. Improve classroom management in order to increase instructional time | <p>1.3.1. Simplify restorative practices for easier use and more consistent implementation: clarify expectations to be more cohesive and unified (e.g. shared language, "If... then...")</p> <p>1.3.2. Create flow charts for management of extreme behaviors (Tier 1-2)</p> <p>1.3.3. Provide support in developing routines and transition techniques</p> <p>1.3.4. Develop playbook for highly accountable centers-based work</p> | <ul style="list-style-type: none"> ◇ % of staff receiving behavior management training ◇ % of staff receiving consistent coaching support ◇ Clearly articulated administrative system of consequences and incentives under restorative justice practice is published in Bank ◇ Student time in office decreases | <ul style="list-style-type: none"> ◇ Vice Principals ◇ Coaches ◇ Outside training support |

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| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 1.4. Develop and monitor ELA and Math systems of support (K-8) | 1.4.1. Evaluate current intervention process and protocols 1.4.2. Develop a tiered outline of Tier 1, 2 and 3 academic supports so continuum of supports is made visible 1.4.3. Provide training in foundational reading and math instructional strategies and scaffolding practices to differentiate 1.4.4. Provide English Language Learner training, including ELD standards and best practices 1.4.5. Leverage After School Program for extended learning opportunities, including reading and homework support 1.4.6. Assess need for additional support staff with behavioral and academic expertise 1.4.7. Cultivate relationships to design MOUs for SpEd/FAPE | ◇ Intervention system is developed ◇ 100% of staff receives ELD training ◇ ___% of planned intervention hours completed ◇ Adequate staff and technology to support implementation of interventions ◇ Student data system is expanded to organize intervention data and track intervention outcomes ◇ Instructional staff have access to and ability to navigate MTSS site data and tracking | ◇ Superintendent ◇ Principals ◇ Coaches ◇ Grade Level Teams |

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| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 1.5. Increase the effectiveness and versatility of instructional design and content offerings | 1.5.1. Articulate adaptability of "GATE for all" for all student populations 1.5.2. Deepen staff's knowledge of how to utilize gifted education methods and strategies in a manner that strengthens foundational teaching | <ul style="list-style-type: none"> ◇ % of CAG-trained staff ◇ % of staff who report a deeper practice of gifted education methods for foundational learning ◇ Coaching time allocated in calendar for this purpose ◇ % of staff report increased confidence in their ability to integrate gifted education strategies into foundational teaching (e.g. guided reading groups, reading centers) | <ul style="list-style-type: none"> ◇ Superintendent ◇ Principals ◇ Coaches ◇ Grade Level Teams |

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| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 1.6. Cultivate student awareness of and ability to articulate their academic growth | <p>1.6.1. Expand student-led conferences:</p> <ul style="list-style-type: none"> ◇ Develop an articulated framework for grade levels, so students can be supported and experience the benefits of this shift <p>1.6.2. Provide more self-assessment opportunities</p> <p>1.6.3. Increase qualitative feedback on student performance and achievement</p> <p>1.6.4. Teach skills for how to give and receive constructive feedback</p> <p>1.6.5. Create ceremonies and activities that encourage moments of reflection on students' academic progress and achievements</p> <p>1.6.6. Calibrate how to assess student reflections</p> | <ul style="list-style-type: none"> ◇ Developed rubrics (or other methods for providing feedback) for student reflections are published in Bank ◇ Staff are engaged in collaborative reflection to refine instructional practice, calendar reflects time allocated ◇ Framework for student-led conferences is published in Bank | <ul style="list-style-type: none"> ◇ Superintendent ◇ Principals ◇ Coaches ◇ Grade Level Teams |

| GOAL 2 All students are engaged by connecting their interests and learning to develop awareness of self, community, and world. | | | |
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| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 2.1. Support social and emotional development and mental health | 2.1.1. Clarify expectations around school-wide discipline and SEL approach 2.1.2. Reinforce accountability and personal responsibility during unstructured times (i.e. hallways, recess, lineup) 2.1.3. Integrate inclusion and mindfulness in curriculum: <ul style="list-style-type: none"> ◇ Develop process for SMART SEL goals and be able to measure progress (portfolios, ILPs) ◇ Identify space for emotional processing (Year 2) ◇ Teach self-regulation and emotional awareness (Year 2) ◇ Teach self-advocacy techniques to help students recognize and speak to their mental and emotional status (Year 2) 2.1.4. Build preventative relationship-building activities (e.g. Buddies program) and peer counseling programs (Year 2) 2.1.5. Develop a recess framework to clarify expectations for safe and healthy play (Year 2) | <ul style="list-style-type: none"> ◇ 100% staff trained and knowledgeable about discipline and SEL program ◇ 90% students demonstrate common language of SEL program ◇ Reduction in behavioral incidents during unstructured periods ◇ Observations of peer-to-peer conflict resolution | <ul style="list-style-type: none"> ◇ Vice Principals ◇ Coaches ◇ School Psych ◇ Ed Specialist |

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| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 2.2. Develop students' leadership capacity and facilitate student interests through optional avenues | 2.2.1. Further develop clubs and extra-curricular activities 2.2.2. Explore student opportunities ideas such as: ◇ Create peer mentorship programs ◇ Increase participation in County competitions ◇ Build Makerspaces 2.2.3. Articulate and maintain extra curricular offerings | ◇ Articulated list of participatory activities available (November program update) ◇ Increase in student participation in clubs/activities in after-school hours or in after-school program ◇ Student survey responses regarding quality and relevance of after school opportunities ◇ Students participating in community and county events and competitions | ◇ Operations Director ◇ Parent leadership ◇ TBD: Identify support staff facilitators to determine needs |

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| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 2.3. Refine real-world learning experiences (i.e. PBL and service learning) to maximize their learning potential | 2.3.1. Revise PBL planning framework template to emphasize assessment, scaffolds for low/high differentiation, voice/choice, etc. 2.3.2. Develop a model PBL unit and establish quality control checks 2.3.3. Provide support to further integrate PBL with core subject curriculum 2.3.4. Engage parents who are subject experts and local businesses and organizations to enhance learning experience 2.3.5. Develop eco-conscious campus initiatives (Year 2) 2.3.6. Facilitate annual community service work becoming more integrated with PBL units and authentically connected with core academics (Year 2) | ◇ Refined PBL frameworks in Bank ◇ Increased student exposure to real-world problem solving via data collection or student survey, contact/collaboration with working professionals or experts ◇ Coaching time allocated for development of tools and for facilitating instructional shift | ◇ Grade Level Teams ◇ Coaches ◇ Principals ◇ Parent leadership ◇ PBL Advisory Committee of Teachers and Teacher-aspiring Aides |

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| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 2.4. Develop technology guidance for the organization | 2.4.1. Assess current resources and gaps, update inventory and replacement plans with cost estimates in Bank 2.4.2. Develop minimum TACMO expectations for tech use/competencies in classrooms by grade levels 2.4.3. Develop technology training plan per individualized needs of staff 2.4.4. Evaluate multi-year technology budget, goals, and the quality of newly-acquired VUSD tech support/ tech replacement included in our new Facility Use Agreements to create a revised tech budget 2.4.5. Explore technology supports for academic interventions to evaluate best choice per needs, publish identified/selected resources in Bank 2.4.6. Create an online platform to engage parents' needs, resources, and skills and communicate opportunities | ◇ 100% staff are aware of available technology resources ◇ 100% staff are trained in use of technology resources ◇ 100% of classrooms use a platform to communicate (Seesaw, Remind, Dojo, Google Sites, Portfolios) | ◇ Operations Director ◇ Superintendent ◇ Principals ◇ VUSD Tech staff ◇ Technology training support (TCOE) |

| GOAL 3 Teachers, staff, and administrators are supported and empowered to continuously improve their practice for the benefit of themselves, their students, and the greater public education system | | | |
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| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 3.1. Define TACMO instructional support framework and PD pathways toward mastery for all instructional staff (including annual school-wide PD initiatives per site goals/needs) | 3.1.1. Improve and design explicit PD pathways for consistency of new teacher and staff onboarding 3.1.2. Identify opportunities for more mentorship across teachers and coaches for increased support, coaching, and debriefs 3.1.3. Create tiered system of mastery for teacher development (i.e. scope and sequence) 3.1.4. Increase awareness of non-negotiables/required PD versus differentiated PD across sites 3.1.5. Identify most-needed training across all positions and prioritize these within a scope/sequence, or pathway 3.1.6. Improve alignment of evaluation/feedback systems for increased feedback for personalized professional or instructional goals | ◇ Pathways published in Bank for teachers ◇ Professional development calendar identifies coaching cycles and mentorship ◇ Updated teacher evaluation/feedback forms | ◇ Superintendent ◇ Principals ◇ Coaches |

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| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 3.2. Formalize professional development and support for instructional aides and substitute teachers | 3.2.1. Develop an aide-to-teacher training program 3.2.2. Identify trainings needed per aide role and assignments (e.g. grade, content, behavior mgmt., special student needs) 3.2.3. Improve communication and feedback channels for aides (e.g., reduce all staff email confusion, increase specific email messaging to only aides) 3.2.4. Create a Substitute Academy program (e.g., quarterly sub training event for new recruitment and onboarding) | ◇ % aide staff who report improved communications (survey) ◇ # Substitute Academy events held, # of attendees ◇ Length of substitute list | ◇ HR & Admin Specialist ◇ Superintendent ◇ Vice Principals |
| 3.3. Refine evaluation and formal feedback processes | 3.3.1. Develop clear coaching/improvement focus and message within performance evaluation process (e.g., forms, debriefing content/messages, targeted responses to areas of needed growth) 3.3.2. Create a scope and sequence for teacher and staff coaching 3.3.3. Develop personal portfolios 3.3.4. Schedule peer-to-peer observations | ◇ Coaching cycles established with systematized plan ◇ Coaching scope and sequence is published in Bank | ◇ Superintendent ◇ Principals ◇ Coaches |

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| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 3.4. Strengthen community and collaboration | 3.4.1. Develop and implement shared decision-making process 3.4.2. Improve communication and collaboration across staff, specialists, and core teachers 3.4.3. Look for meaningful opportunities to convene all TACMO staff or particular subgroups of staff more often 3.4.4. Define the balance between directed vs. open planning time by piloting a year of seeking to achieve greater "protected time" or open planning time 3.4.5. Look for opportunities to improve the coordination of schedules (e.g. specials) to maximize grade level teacher collaboration 3.4.6. Increase and formalize regular check-ins across grade level teams and between staff levels (e.g. instructional aide, teacher, specialist) 3.4.7. Organize staff social events 3.4.8. Engage all staff in ongoing dialogue regarding core philosophies and methodologies (e.g. constructivist, progressive) | ◇ Increase in collaboration time as compared to baseline time ◇ Documented outcomes of collaboration efforts | ◇ Superintendent ◇ Principals ◇ Coaches ◇ Grade Level Lead Teachers |

| GOAL 4 | TACMO operates as a hub of resources, support, and opportunities for its families and greater community. | | |
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| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 4.1. Respond to parents' skill gaps and desired areas of support | <p>4.1.1. Create regular feedback system to identify parent needs; incentivize parent participation and feedback</p> <p>4.1.2. Develop parent workshops and trainings:</p> <ul style="list-style-type: none"> ◇ Restorative justice and SEL tools ◇ Subject content nights (reading, math, metacognition) ◇ Content and curriculum ◇ Instructional strategies ◇ School policy review (e.g. rights of parents, parent expectations, public education law, classroom volunteer policy) <p>4.1.3. Develop an application or online learning platform, unified across all grade levels for parents to extend learning beyond school</p> <p>4.1.4. Promote ongoing parent-to teacher communication</p> <p>4.1.5. Digitize back-to-school paperwork</p> | <ul style="list-style-type: none"> ◇ Feedback system to capture parent needs ◇ Master Calendar shows scheduled Parent Workshops ◇ # of Parent Workshops ◇ # of attendees at workshops ◇ Workshop participant survey results | <ul style="list-style-type: none"> ◇ Principals ◇ Vice Principals ◇ Grade Level Teams ◇ Teacher leaders ◇ PTO engagement |

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| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 4.2. Encourage parent and community contributions of expertise, time and resources to supplement student learning | <p>4.2.1. Establish tradition of PTO and Site Principal meeting annually to align PTO leadership to strategic plan initiatives, LCAP goals, school calendar of events, and budgeting/planning for PTO contributions</p> <p>4.2.2. Encourage and catalogue parent information regarding occupation, expertise, and resources and share with all teachers</p> <p>4.2.3. Routinize teacher requests for in-classroom parental support and learning enhancements (e.g. subject experts)</p> <p>4.2.4. Connect parents to student clubs and interests (e.g. parent-led career day)</p> <p>4.2.5. Provide specific and varying campus volunteer opportunities (e.g. Lunch Buddies)</p> <p>4.2.6. Create opportunities for parents to collaborate to help with site or organizational problem-solving</p> | <ul style="list-style-type: none"> ◇ Increase in % of parents involved ◇ Increase in # of parent volunteer hours ◇ Information system to catalogue parent interest and ability to contribute ◇ Matching system in place to pair classroom and school events with parent needs | <ul style="list-style-type: none"> ◇ Principals ◇ PTO leaders ◇ Teacher leaders ◇ Resource library/ area for parents (TBD) |

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| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 4.2. Encourage parent and community contributions of expertise, time and resources to supplement student learning | 4.2.7. Develop a tracker for staff to be able to monitor diverse contributions of time and resources to study the issue of parent involvement and identify site-specific challenges 4.2.8. Celebrate diverse parent engagement | <ul style="list-style-type: none"> ◇ Increase in % of parents involved ◇ Increase in # of parent volunteer hours ◇ Information system to catalogue parent interest and ability to contribute ◇ Matching system in place to pair classroom and school events with parent needs | |

| GOAL 4 | TACMO operates as a hub of resources, support, and opportunities for its families and greater community. | | |
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| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 4.3. Promote student, family, and staff connectedness to the TACMO community and our greater surrounding communities | 4.3.1. Create a community asset map to organize local resources and partners 4.3.2. Build a physical Community Board on campus to advertise and connect parents' needs and resources 4.3.3. Develop family social initiatives (e.g. hiking) and events (e.g. Game Night, school dinners, Open House for local residents and community members) 4.3.4. Encourage parent-led community service events (e.g. volunteer at assisted living centers) 4.3.5. Attend and host student-centered community events (e.g. Science Fair, Mock Trial, Spelling Bee) and participation in community events (e.g. local parades) 4.3.6. Develop Communications Plan and Calendar, including the organization's use of social media; News & Notes emails, and other tech tools for communications to clarify responsibilities for team members for consistent and impactful messaging | ◇ Teachers and staff participate in local events and workshops as representatives of our schools/org ◇ # of community events where TACMO is represented | ◇ Operations Director ◇ Summer 2019 planning time ◇ Trimester planning time for all staff to coordinate parent and community engagement opportunities (Teacher stipends) ◇ After-school program alignment |

| GOAL 5 | TACMO is thriving and is recognized as a sustainable public education institution. | | |
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| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 5.1. Ensure financial health and vitality | 5.1.1. Deliver annual budget update to all staff 5.1.2. Maintain an advisable financial reserve (approx. 23%) and articulate reserve spending philosophy and decision-making process ◇ Develop written policy for "appropriate" uses for reserve spending 5.1.3. Review CALPADS and School Nutrition data entry process to find quality control measures that would ensure fidelity and accuracy 5.1.4. Maximize ADA by implementing appropriate evidence-based attendance best practices (e.g. preventative sickness measures) 5.1.5. Refine Timecard process to ensure alignment in quality checks across HR and leadership; explore digital timesheets 5.1.6. Explore additional revenue streams (e.g. independent study programs, package and market TACMO-developed operational systems) | ◇ Established budgetary benchmarks ◇ Multi-year financial planning ◇ Healthy financial reserves ◇ Staff understand budget priorities and constraints ◇ Maintain or increased ADA (96% or better) ◇ Maximum LCFF funding | ◇ Superintendent ◇ Board of Directors ◇ Back-end financial service provider |

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| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 5.1. Ensure financial health and vitality | 5.1.7. Explore and consider outside private funding partners 5.1.8. Identify internal initiatives to improve processes or organizational efficiency (e.g. reduce paper reliance of in-house operations, develop a TACMO student data program) | ◇ Established budgetary benchmarks ◇ Multi-year financial planning ◇ Healthy financial reserves ◇ Staff understand budget priorities and constraints ◇ Maintain or increased ADA (96% or better) ◇ Maximum LCFF funding | |
| 5.2. Recruit, retain and support talent | 5.2.1. Articulate unique experience and benefits of being a TACMO employee (all positions) 5.2.2. Refine staff survey to better understand drivers of satisfaction and retention 5.2.3. Establish staff liaison to represent collective staff needs and create regular opportunities for staff liaison, CMO leadership, and Board to engage in dialogue | ◇ Staff turnover rates ◇ Staff retention and satisfaction survey results ◇ Participation in recruitment events (#) ◇ Evaluated as a competitive employer ◇ Aggregated performance evaluations show improvement | ◇ Superintendent ◇ Principals |

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|---|--|--|---------------------------------|
| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 5.2. Recruit, retain and support talent | 5.2.4. Evaluate appropriate and sustainable staffing model to meet student needs and explore feasibility of items staff has indicated they desire: <ul style="list-style-type: none"> ◇ Raise teacher salaries to district levels ◇ Increase specialist salary to greater than or equal to substitute level ◇ Expand benefits for specialists and aides ◇ Provide retirement benefits for CMO staff ◇ Transition specialists to full-time positions ◇ Increase paid prep time ◇ Increase number of instructional aides ◇ Reduce number of work days ◇ Reduce number of in-person pre-service days ◇ Roll-over unused PTO (sick days) | <ul style="list-style-type: none"> ◇ Staff turnover rates ◇ Staff retention and satisfaction survey results ◇ Participation in recruitment events (#) ◇ Evaluated as a competitive employer ◇ Aggregated performance evaluations show improvement | |

| GOAL 5 | TACMO is thriving and is recognized as a sustainable public education institution. | | |
|---|---|--|---------------------------------|
| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 5.2. Recruit, retain and support talent | <ul style="list-style-type: none"> ◇ Pay for instructional aides and specialists to attend quarterly staff meetings ◇ Shorten school day; adjust school calendar <p>5.2.5. Explore opportunities to better focus staff areas of expertise and optimize planning and preparation time (e.g. departmentalization of teachers by subject area; schedule changes; credentialing assignments)</p> <p>5.2.6. Develop succession plans for all leadership roles and needed training (i.e. site leadership training for emerging leaders)</p> | <ul style="list-style-type: none"> ◇ Staff turnover rates ◇ Staff retention and satisfaction survey results ◇ Participation in recruitment events (#) ◇ Evaluated as a competitive employer ◇ Aggregated performance evaluations show improvement | |

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|---|---|--|--|
| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 5.3. Increase reach of messaging and strengthen the TACMO brand | 5.3.1. Develop storytelling from each key stakeholder perspective and experience (students, parents, and staff) 5.3.2. Refine elevator pitch and reinforce across all school members 5.3.3. Update promotional materials 5.3.4. Define and communicate unique middle school model and offerings 5.3.5. Participate in local conferences | ◇ Increased enrollment at both sites for target population (gifted, low-income) ◇ Growing waitlists ◇ Family survey response addresses charter school misconceptions | ◇ Operations Director ◇ CMO Staff ◇ Superintendent ◇ Principals |

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|---|--|--|---|
| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 5.4. Contribute to the improvement of our public education system | 5.4.1. Produce proof of our model: approach and outcomes 5.4.2. Pursue grant opportunities (e.g. federal grant to study hypothesis that "Gifted Ed for All" is an effective strategy to close the achievement gap) 5.4.3. Develop university partnerships for increased research capacity 5.4.4. Capture internal improvements to curriculum to share with broader community 5.4.5. Map and build authentic relationships with local leaders and political allies (local, state, national) | ◇ Articulated proof of our model ◇ Evidence of influence (e.g. policy change) | ◇ Superintendent ◇ Principals ◇ Coaches |

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|--|--|---|--|
| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 5.5. Explore opportunities for organizational growth and expansion | 5.5.1. Evaluate feasibility and benefits of: <ul style="list-style-type: none"> ◇ Increased enrollment per the Prop 51 opportunity (school size of 521 from 378 model) ◇ Consolidated middle school ◇ Independent study offering ◇ Preschool expansion ◇ High school expansion 5.5.2. Evaluate opportunities for campus re-location to increase accessibility | <ul style="list-style-type: none"> ◇ Administrators communicate growth and expansion opportunities, conduct evaluations, apply decision-making rationale ◇ Administrators produce a feasible and comprehensive growth plan for identified opportunities | <ul style="list-style-type: none"> ◇ Principals ◇ Superintendent ◇ Board of Directors |

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|------------------------------------|---|---|--|
| STRATEGIES | TACTICS | METRICS | LEAD(S) RESPONSIBLE & RESOURCES |
| 5.6. Explore facility improvements | 5.6.1. Continue participation in the 2019-2020 Facility Improvement Plan working towards the following possible outcomes: <ul style="list-style-type: none"> ◇ Install sinks in every classroom ◇ Build a library at Blue Oak Academy ◇ Construct more adult bathrooms ◇ Place more water fountains throughout the school ◇ Construct rest areas and benches for students ◇ Invest in greater playground supplies and equipment | <ul style="list-style-type: none"> ◇ Site improvements make sites "reasonably equivalent" ◇ Site development plans (in collaboration with VUSD) | <ul style="list-style-type: none"> ◇ Principals ◇ Superintendent ◇ Board of Directors |

SWOT Analysis

TACMO STRENGTHS

- ◇ Collaborative and caring community of talented teachers and staff working together to fulfill the mission and vision
- ◇ Founding superintendent vision and exceptional capabilities
- ◇ Unique school design and student experience
- ◇ Proven methodology and organizational achievements
- ◇ School climate and behavior management pedagogy
- ◇ Engaged and dedicated parent community, including a high number of staff who are also parents of current students
- ◇ Growing list of community partners
- ◇ Effective communication to parents regarding individual student growth and organizational news and updates
- ◇ Healthy financial reserve

“The level of engagement and ambition in the teachers is unmatched at other schools that I’ve seen.”

“By adopting restorative justice practices early on, we were at the forefront of what has now become a wave of change in school discipline. I’m proud of our team for continuing to tackle the challenges and continue to take each situation individually and within its own context.”

SWOT Analysis

SVA STRENGTHS

- ◇ Project-based learning, rich curriculum, and high-level instruction driven by effective teachers and passionate instructional aides
- ◇ Wholistic child assessment and individual student support
- ◇ Teacher autonomy, professionalism, trust, and flexibility

“We celebrate and embrace each child’s uniqueness and individuality. We’ve been able to support many types of students who would not otherwise be successful in a more typical school setting.”

“When it comes to a family obligation (ex: my kids get sick), teachers are trusted; I don’t feel like I am being micromanaged.”

BOA STRENGTHS

- ◇ Dynamic and committed founding team
- ◇ Supportive, energetic, and flexible school principal
- ◇ PTO and parent support, participation, and involvement

“An amazing principal that communicates and shows care for staff and students.”

“Parent involvement is key to success within the school. I absolutely love that there is a school motto and that the kids are taught to be good people.”

SWOT Analysis

TACMO WEAKNESSES

- ◇ Lack of clarity on how to fulfill mission, vision, and core approach for a changing student population with increased individualized needs
- ◇ Underdeveloped structures and systems of newly integrated special education program

“Even if some students’ test scores do not necessarily improve, they are still getting a better and broader education from us, especially when we stay focused on the Gifted Education/CAG strategies. But I am not yet sure that teaching solely in this way, as intended by our charter, will produce positive test score results for all academic levels equally. That said, if we shift our focus to intervention and remediation, then I am not sure we are following the intent and purpose of our charter.”

“We need a coherent special education program with clearly defined roles for the program director, teachers, and aides.”

SWOT Analysis

TACMO WEAKNESSES

- ◇ More targeted professional development and personalized support based on teacher experience and needs
- ◇ Disconnected data systems
- ◇ School-site staff untrained in CMO policies and protocols
- ◇ Parents unversed in restorative justice disciplinary practices
- ◇ Limited physical space (e.g. classroom space, intervention support, bathrooms)
- ◇ Low technology integration and lack of investment in updated technology resources

“There are some basic trainings like guided reading or engagement strategies that young staff have never received.”

“I can count on one hand how many observations I’ve had in the last two to three years. I know that the intentions have always been there, we just always have so many other jobs to do and so little staff to do it.”

“I feel like we are doing too many things in too many different places and ways. If we could have all the information going into one system, I believe we would be more efficient.”

“We need to ensure that our structures for policies, flow charts, and systems are easier to follow for longevity.”

SWOT Analysis

SVA WEAKNESSES

- ◇ Inconsistent approach and curriculum to classroom management and community building
- ◇ Gaps in vertical alignment (i.e. year-over-year student learning expectations)
- ◇ Need for increased instructional aide support, structure, and training
- ◇ Student body is currently under-enrolled for the first time in SVA's recent history

“More training for support staff would be beneficial for all staff to have universal language and a consistent approach to handle situations that results in positive outcomes for all involved.”

BOA WEAKNESSES

- ◇ Unequipped to meet the needs of students with extreme behavioral challenges and gaps in academic readiness
- ◇ Lack of connection between grade level teachers

“Develop a clear, feasible, system of intervention for ELA and math that provides support at all grade levels, is properly staffed, and works in tandem with classroom instruction.”

“Classroom instructional aide support (in addition to those currently acting as one-on-one aides) would greatly add to the ability of the classroom teacher to teach open-ended lessons and small groups.”

SWOT Analysis

TACMO OPPORTUNITIES

- ◇ Evaluate expansion (number of students, pre-school, high school), new programs (homeschool, independent study) and replication opportunities (number of K-8 schools)
- ◇ Re-articulate the academic model and contribute best practices in the field
- ◇ Solidify unique middle school model (e.g. GATE emphasis)
- ◇ Re-vamp teacher and staff support systems

“In opening BOA, we learned that sometimes bold steps like replication are required simply to stay viable.”

“There is an opportunity to be an advocate for universal gifted education in our public schools across the state and nation.”

“Instructional aides (not just one-on-ones), coaching cycles, not just a two-minute chat in the halls, and paid planning time for curriculum development would make staff feel empowered and valued.”

“Staff evaluations feel formulaic. I think a portfolio-based evaluation process would be more meaningful and philosophically aligned. As with students, this would focus on growth above minimum standards.”

SWOT Analysis

TACMO OPPORTUNITIES

- ◇ Clearly define opportunities and pathways for career advancement and increased leadership within the organization
- ◇ Increase use of data-informed instruction that engages students as drivers of their education
- ◇ Deepen staff competency in instructional strategies and support (special education to GATE)

“I would like to continue teaching, but I would also like to pursue my masters and be a resource teacher or literacy coach in the future.”

“I would love to one day be in an administrative position, leading our special education and intervention departments.”

“I think it’s time to grow in our academic excellence. I hope leaders can spend less time on systems and processes and spend more time on digging into student learning data and ensuring we are driving instructional improvement in our teachers and aides.”

“I hope our instructional staff will deepen their understanding of and use of gifted education strategies so that all believe it is an effective tool to address the achievement gap and overcome the limiting effects of poverty.”

SWOT Analysis

TACMO OPPORTUNITIES

- ◇ Increase staff community and communication across sites (e.g. celebrations, annual retreat) and between sites and the charter management administration (e.g. feedback opportunities, shared decision-making)
- ◇ Strengthen connectedness across the TACMO schools for enhanced student experience (scholarly competition, K-8 buddies, school traditions)
- ◇ Re-focus student projects, learning opportunities, and programs (e.g. Spanish instruction K-8, environmental, music, sports)
- ◇ Improve brand awareness and strengthen community presence (local, county, state)
- ◇ Increase number of thought partners for external-facing opportunities and resource exchange (e.g. Diverse Coalition for Charter Schools, universities and colleges, corporations, GATE organizations, Central Valley charter school alliance)
- ◇ Utilize local district partners (e.g. Visalia Unified School District) and community businesses and organizations for technology upgrades

“If we had more ongoing inclusive input and decision making processes, we could be less reactive to issues as they arise and more proactive about addressing the needs of students.”

“Until we dispel common myths about us such as we are a private school, we will never have the support we need and we deserve from external communities. We need to educate the general public.”

SWOT Analysis

SVA OPPORTUNITIES

- ◇ Re-evaluate scheduling and organization of extra-curricular activities
- ◇ Pilot social skills groups, peer mediation, and counseling

BOA OPPORTUNITIES

- ◇ Reach full capacity K-8
- ◇ Formalize new curriculum and approach to close the achievement gap through GATE instructional strategies

SWOT Analysis

TACMO THREATS

- ◇ Ability to deliver a comprehensive and rigorous program with finite resources
- ◇ Dependence on founding superintendent and identifying successor
- ◇ Vulnerability of charter school leaders to unexpected and time-intensive legal and compliance changes and management issues
- ◇ Long-term financial sustainability and financial commitments (e.g. increasing minimum wage, pension contributions)
- ◇ External focus on standardized test scores as primary performance indicator
- ◇ Unknown political climate (district, county, state-wide)
- ◇ Long-term facility agreements

“Ruth has set the bar incredibly high. The superintendent leads a team of incredible people who will look to him/her for guidance, both verbally and by way of example.”

“I didn’t expect that so much of my energy would need to be expended to simply continue to exist and maintain. Constantly changing state requirements, organizational growth and development needs, authorization politics, human resource issues, student special education or discipline issues that randomly arise, etc. have diminished my ability to assist with the program fine-tuning and staff feedback and coaching.”

SWOT Analysis

TACMO THREATS

- ◇ Sustained middle school enrollment and school competition (newer facilities, program offerings)
- ◇ Environmental concerns inhibiting school experience (air quality, water, access to shade)
- ◇ Increased gun violence in schools and feelings of safety and security
- ◇ Inconsistent understanding of the definition of a charter school (parent community and general public)

SVA THREATS

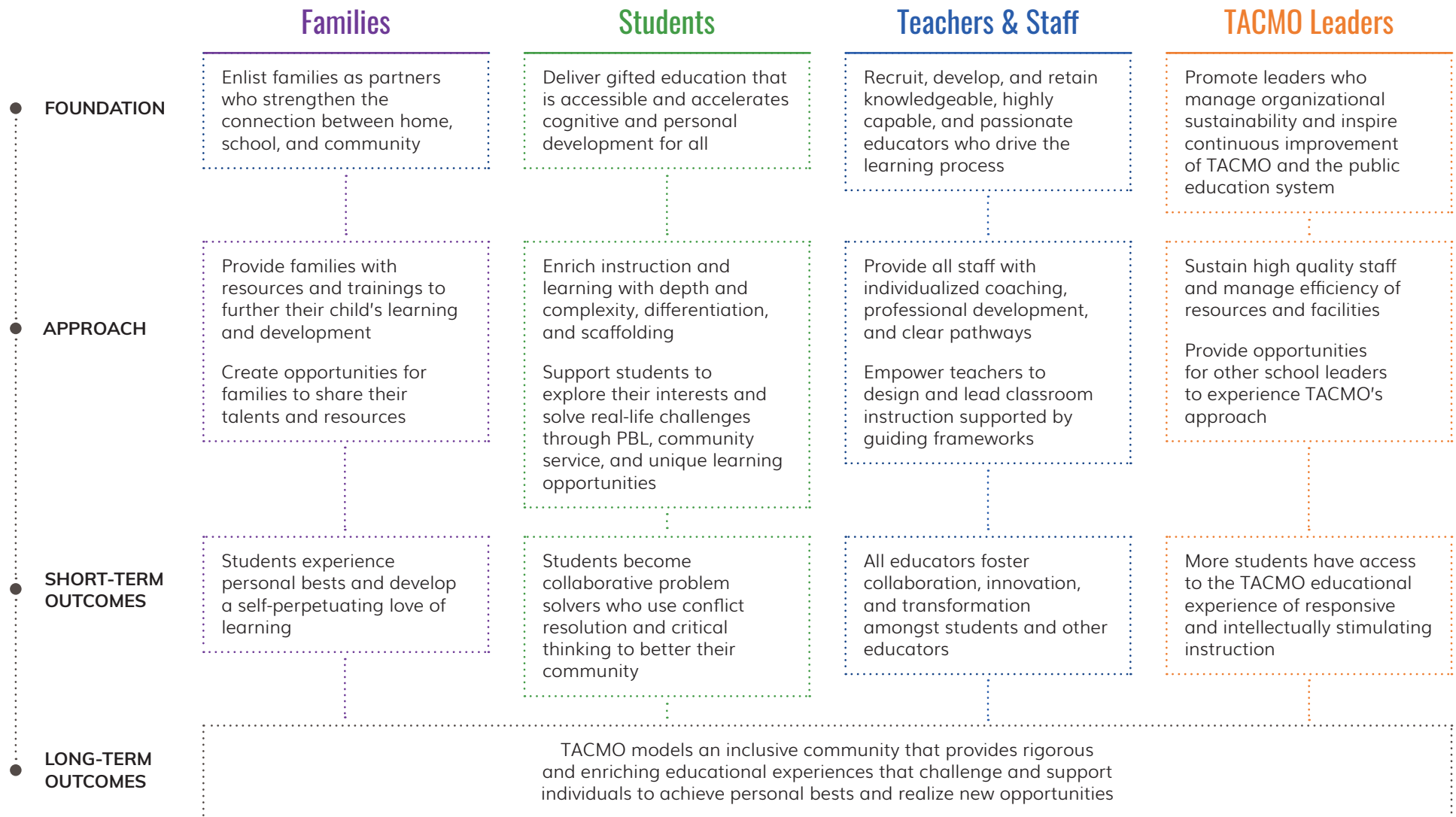
- ◇ Accessibility of school location (distance from city center)

BOA THREATS

- ◇ Teacher and staff sustainability

Theory of Change

Learners equipped with intellectual curiosity, emotional intelligence, and problem-solving skills will transform communities



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