



## Roadmap for the Year: Sara Taylor

[Quarter 1](#)

[Quarter 2](#)

[Quarter 3](#)

**Quarter 4**

**Roadmap**

**Q1 2018 (May - September)**

[PKRs for Quarter](#)

[Notable Events, Dates, and Travel](#)

[Key Activities/Deliverables Towards Priorities](#)

[Learning/Professional Growth Activities](#)

[Monthly PKR Tracker](#)

[PKRs for Quarter](#)

- Talent - Audit processes and create strong project management plan (M: Sara, O: Lela) for codified talent playbook
- Professional Development - Execute a high leverage new teacher training and retreat and build out plan for API development in Q2
- Onboarding - Launch Onboarding 2.5 and program to capture feedback to inform Onboarding 3.0
- HRIS - Launch project plan with Mimi and Dorothy to investigate and select an HRIS system and develop plan for implementation
- Evergreen - Develop IDPs with Lela and Abby and run a successful inaugural "Talent Summit" for strategic planning for the year in September

**Notable Events, Dates, and Travel** (*vacation days in italics*)

May	June	July	August	September
<ul style="list-style-type: none"> <li>• <i>OOO - May 11</i></li> <li>• In Denver - May 16-18</li> <li>• Memorial Day - May 28</li> <li>• Evals Scores Due - May 31</li> </ul>	<ul style="list-style-type: none"> <li>• Offers out - June 1</li> <li>• In Denver - June 6-8</li> <li>• Offers due - June 8</li> <li>• In Denver - June 15 (late) to June 20</li> <li>• <i>OOO - June 23-June 30</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>OOO - July 1-July 7</i></li> <li>• In Denver - July 12-27</li> <li>• Basecamp - July 16-July 30</li> </ul>	<ul style="list-style-type: none"> <li>• Basecamp: August 1-August 7</li> <li>• 1st Day of School: August 8</li> <li>• In Denver - August 14-16</li> <li>• In Denver - August 28-30</li> </ul>	<ul style="list-style-type: none"> <li>• In Denver - September 11-13</li> <li>• Talent Summit - September 24-26</li> </ul>



### Key Activities/Deliverables Towards Priorities

Priority	May	June	July	August	September
Talent	<ul style="list-style-type: none"> <li>Hire 3 people per week to be done by 6/1 or 2 people per week to be done by 6/15.</li> <li>Respond to all interview items within 24 hours.</li> <li>Develop back up plans (using TFA CMs, ATs, etc.) for each open position.</li> <li>Communicate vacation plans if not fully hired to all principals (DID-Vs and interviewing).</li> </ul>	<ul style="list-style-type: none"> <li>Finishing out strong with hiring</li> <li>Provide vacation plans to all, including clear items for Lela</li> <li>Determine dates for back-up plans to go into effect</li> </ul>	<ul style="list-style-type: none"> <li>Develop project plan including DID-Vs and MOCHAs for development of talent playbook</li> <li>Audit guide for talent processes</li> </ul>	<ul style="list-style-type: none"> <li>Hiring stepback and feedback from hiring managers</li> <li>Collect docs from other orgs</li> </ul>	<ul style="list-style-type: none"> <li>Talent summit</li> <li>Staffing plan for SY20</li> <li>Identify any NST and admin hires for SY20</li> <li>Start work with Christin to identify principal candidates</li> </ul>
Professional Development	<ul style="list-style-type: none"> <li>Develop project plan for planning for AP-Principal residency</li> <li>Complete reflection on Leadership study (next year - shift to smaller cohort of teacher to leader with more focus on coaching</li> <li>Revise basecamp plans</li> <li>Final plans for retreat logistics and sessions</li> <li>Select retreat facilitators</li> </ul>	<ul style="list-style-type: none"> <li>Share basecamp plans with facilitators</li> <li>Collect docs for leadership training</li> <li>Finalize Relay</li> </ul>	<ul style="list-style-type: none"> <li>Basecamp and retreat</li> </ul>	<ul style="list-style-type: none"> <li>Develop draft plan for API development</li> </ul>	<ul style="list-style-type: none"> <li>Identify 4 internal API candidates and start development plan</li> <li>Meetings with admin/hiring managers about identification and development</li> <li>60 day onboarding survey</li> </ul>





Onboarding	<ul style="list-style-type: none"> <li>• Draft Onboarding 2.5 new hire facing documents</li> <li>• Feedback on Onboarding 2.5 manager documents</li> </ul>	<ul style="list-style-type: none"> <li>• Feedback on and finalize Onboarding 2.5 new hire facing docs</li> <li>• Finalize Onboarding 2.5 manager documents</li> <li>• Prepare trainings</li> </ul>	<ul style="list-style-type: none"> <li>• Fingerprinting/onboarding etc. at Basecamp</li> <li>• Train hiring managers/principals on onboarding 2.5 and 30/60 day meetings</li> </ul>	<ul style="list-style-type: none"> <li>• 30 day onboarding survey</li> <li>• 30 day check-ins with all new hires</li> </ul>	<ul style="list-style-type: none"> <li>• All certification and documentation on file by Oct 1</li> </ul>
HRIS	<ul style="list-style-type: none"> <li>• None</li> </ul>	<ul style="list-style-type: none"> <li>• None</li> </ul>	<ul style="list-style-type: none"> <li>• Project management plan for HRIS systems with Dorothy and Mimi</li> </ul>	<ul style="list-style-type: none"> <li>• Research HRIS systems</li> </ul>	<ul style="list-style-type: none"> <li>• Select and sample HRIS systems</li> </ul>
Evergreen	<ul style="list-style-type: none"> <li>• Evaluations for Lela and Abby</li> </ul>	<ul style="list-style-type: none"> <li>• Offer letters for all staff</li> </ul>	<ul style="list-style-type: none"> <li>• Fill all open positions with 10 days</li> </ul>	<ul style="list-style-type: none"> <li>• Develop IDP plans with Abby/Lela</li> <li>• Plan talent summit and send pre-work</li> </ul>	<ul style="list-style-type: none"> <li>• Talent summit</li> <li>• Plan for NST/admin hiring plan</li> </ul>

#### Learning/Professional Growth Activities

June	July	August	September
<ul style="list-style-type: none"> <li>• <a href="#">The 5 Languages of Appreciation in the Workplace</a></li> <li>• <a href="#">The Culture Code</a></li> </ul>	<ul style="list-style-type: none"> <li>• Powerful</li> <li>• July Basecamp/Retreat</li> </ul>	<ul style="list-style-type: none"> <li>• Research EMBA</li> </ul>	<ul style="list-style-type: none"> <li>• <del>Critical friends visit</del></li> <li>• <del>Lever conference</del></li> </ul>



## [Monthly PKR Tracker](#)

### Roadmap

Q2 2018 (October - January)

### [PKRs for Quarter](#)

### [Notable Events, Dates, and Travel](#)

### [Key Activities/Deliverables Towards Priorities](#)

### [Learning/Professional Growth Activities](#)

### [Monthly PKR Tracker](#)

### [PKRs for Quarter](#)

- Talent - *Train on and begin implementation of new hiring playbook*
- Professional Development - *Develop strategic year 0 and residency plan for new Principal Residents*
- Onboarding - *Continue Onboarding 2.5 and capture feedback to inform Onboarding 3.0*
- HRIS - *Launch project plan with Mimi and Dorothy to investigate and select an HRIS system and develop plan for implementation*
- Evergreen - *Support Lela and Abby's development and codification of Talent practices*

### **Notable Events, Dates, and Travel** (*vacation days in italics*)

October	November	December	January
<ul style="list-style-type: none"><li>• <i>OOO - 10/6-10/14</i></li><li>• In Denver - 10/22-10/25</li><li>• In Denver - 10/30-10/31</li></ul>	<ul style="list-style-type: none"><li>• Accelerator/NOLA - 11/5-11/9</li><li>• In Denver - 11/12-11/16</li><li>• In Denver - 11/28-11/30</li></ul>	<ul style="list-style-type: none"><li>• In Denver - 12/12-12/14</li><li>• <i>Office Closed - 12/24-1/1</i></li></ul>	<ul style="list-style-type: none"><li>• In Denver - 1/7-1/10</li><li>• In Denver - 1/22-1/25</li></ul>



### Key Activities/Deliverables Towards Priorities

Priority	October	November	December	January
Talent	<ul style="list-style-type: none"> <li>Launch hiring for fellowship and lead teachers</li> <li>Launch recruitment campaigns</li> <li>Work with Edgility on process for Principals in Residence</li> </ul>	<ul style="list-style-type: none"> <li>Observe and coach on hiring process for schools (especially with new admin)</li> <li>Begin recruitment for NST/Admin positions</li> <li>Retention conversations</li> </ul>	<ul style="list-style-type: none"> <li>Prepare/Hire for any mid-year vacancies</li> </ul>	<ul style="list-style-type: none"> <li>Prepare for retention survey and finalization of retention plans</li> </ul>
Professional Development	<ul style="list-style-type: none"> <li>Develop the internal NST survey</li> <li>Codify year 0 plans for principal residents</li> </ul>	<ul style="list-style-type: none"> <li>Send information for evaluations and prepare staff for evaluation shifts</li> </ul>	<ul style="list-style-type: none"> <li>Share internal process for APIs/Principal Residents</li> </ul>	<ul style="list-style-type: none"> <li>Lead evaluation process</li> </ul>
Onboarding/ Salary	<ul style="list-style-type: none"> <li>60 day check-ins</li> <li>Collect input from stakeholders around salary philosophy</li> </ul>	<ul style="list-style-type: none"> <li>Develop salary philosophy and 2-3 potential options</li> </ul>	<ul style="list-style-type: none"> <li>Present options to cabinet for feedback</li> </ul>	<ul style="list-style-type: none"> <li>Present to board for approval</li> </ul>
HRIS	<ul style="list-style-type: none"> <li>Develop project plan with Mimi and Dorothy</li> </ul>	<ul style="list-style-type: none"> <li>Discuss overlays</li> </ul>	<ul style="list-style-type: none"> <li>Make recommendation</li> </ul>	<ul style="list-style-type: none"> <li>Develop implementation plan</li> </ul>
Evergreen	<ul style="list-style-type: none"> <li>1:1s with Abby/Lela</li> <li>Trainings with hiring staff</li> </ul>	<ul style="list-style-type: none"> <li>Retention conversations</li> </ul>	<ul style="list-style-type: none"> <li>December holiday plan for communication with applicants</li> </ul>	<ul style="list-style-type: none"> <li>Lela/Abby Evaluations and retention conversations</li> </ul>





**Learning/Professional Growth Activities**

October	November	December	January
<ul style="list-style-type: none"><li>•</li></ul>	<ul style="list-style-type: none"><li>• Accelerator Conference</li><li>• Charter School Growth Fund Presentation</li></ul>	<ul style="list-style-type: none"><li>•</li></ul>	<ul style="list-style-type: none"><li>•</li></ul>

[Monthly PKR Tracker](#)



## Roadmap

Q3 2019 (February - April)

[PKRs for Quarter](#)

[Notable Events, Dates, and Travel](#)

[Key Activities/Deliverables Towards Priorities](#)

[Learning/Professional Growth Activities](#)

[Monthly PKR Tracker](#)

[PKRs for Quarter](#)

- Talent - *Hire, hire, hire*
- Professional Development - *Continue PiR search and planning process; roll out the compensation philosophy*
- Onboarding - *Plan for 2019-2020 onboarding*
- HRIS - *Begin implementation with Paylocity and develop playbooks*
- Evergreen - *Support Lela and Abby's development and begin off-boarding process for CTO*

**Notable Events, Dates, and Travel** (*vacation days in italics*)

February	March	April
<ul style="list-style-type: none"><li>• Denver - February 6-8</li><li>• OOO - February 19</li><li>• Denver - February 20</li><li>• SFO - February 21-24</li></ul>	<ul style="list-style-type: none"><li>• Denver - March 5-7</li><li>• OOO - March 11-15, 18</li><li>• Denver - March 19-22</li></ul>	<ul style="list-style-type: none"><li>• Denver - April 3-6</li><li>• Denver - April 16-18</li><li>• Denver - April 30-May 3</li></ul>



### Key Activities/Deliverables Towards Priorities

Priority	February	March	April
Talent	<ul style="list-style-type: none"><li>• 60% Hired</li><li>• Intent to Returns</li><li>• Finalize NST/Admin Positions, Posts and Processes</li></ul>	<ul style="list-style-type: none"><li>• 67% Hired</li><li>• Process NST/Admin</li></ul>	<ul style="list-style-type: none"><li>• 75% Hired</li><li>• Finish out NST/Admin hiring</li><li>• Create onboarding plans</li></ul>
Professional Development	<ul style="list-style-type: none"><li>• DEI Session</li></ul>	<ul style="list-style-type: none"><li>• Leadership Study</li></ul>	<ul style="list-style-type: none"><li>• Support new teacher orientation planning</li></ul>
Onboarding/ Salary	<ul style="list-style-type: none"><li>• Roll out new comp plan</li></ul>	<ul style="list-style-type: none"><li>• Issue offer letters</li></ul>	<ul style="list-style-type: none"><li>• Plan for onboarding for new staff</li></ul>
HRIS	<ul style="list-style-type: none"><li>• Work with paylocity on set-up and implementation</li></ul>	<ul style="list-style-type: none"><li>• Implementation</li><li>• Policy manual revision and legal review</li></ul>	<ul style="list-style-type: none"><li>• Plan for HRIS use for new staff</li></ul>
Evergreen	<ul style="list-style-type: none"><li>• Implement Abby/Lela's new 70:20:10 plans</li></ul>	<ul style="list-style-type: none"><li>• Codification and planning for new CTO</li></ul>	<ul style="list-style-type: none"><li>• Plan for exit interview conversations, closeout for the year</li></ul>





### Learning/Professional Growth Activities

February	March	April
<ul style="list-style-type: none"><li>• National Equity Project</li></ul>	<ul style="list-style-type: none"><li>• CSGF Presentation</li></ul>	<ul style="list-style-type: none"><li>• </li></ul>

### [Monthly PKR Tracker](#)