



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



Key Activities/Deliverables Towards Priorities

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



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

Learning/Professional Growth Activities

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



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



Key Activities/Deliverables Towards Priorities

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



Learning/Professional Growth Activities

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

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



Key Activities/Deliverables Towards Priorities

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



Learning/Professional Growth Activities

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

[Monthly PKR Tracker](#)