



Proposal For:

Charter School Governing Board Training

Georgia Department of Education

Presented by Education Planners, LLC

358 Roswell Street, Suite 1200

Marietta, Georgia 30060

www.edplanners.org

678-576-5333



Louis J. Erste
Associate State Superintendent for Policy, Charter Schools,
District Flexibility, and Governmental Affairs
Georgia Department of Education
2053 Twin Towers East
205 Jesse Hill Jr. Drive, SE
Atlanta, GA 30334

Re: Charter School Board Governance Training

Mr. Erste,

This is our letter of intent for submission of our proposal to provide charter school governing board training to Georgia's locally-approved start-up and conversion charter schools for the 2017-2018 school year.

James Wilson, CEO
Education Planners, LLC
358 Roswell Road, Suite 1200
Marietta, GA 30060
jwilson@edplanners.org

Founded by James Wilson, nationally acknowledged education leader and innovator of instructional technology as Superintendent of the Fulton and Cobb County School Systems in Georgia, Education Planners is an educational consulting firm whose combined experience in education leadership spans more than 200 years. As a consortium of recognized educational leaders and senior associates, Education Planners specializes in helping school systems K-12 succeed in overall performance by evaluating and making recommendations for the personnel, systems, and processes already in place. Education Planners has solutions for the wide range of challenges that impact all school systems.

Our services include:

- Institutional assessments
- School board governance training
- Personnel and management reviews
- School construction oversight and project development
- Bond and tax referendum preparation (establishment of SPLOST)
- Technology integration
- Financial evaluation and management, including accounting, reporting and audits
- Leadership training, and
- Stakeholder communications and community engagement

As a trusted advisor to some of the nation's largest school systems, Education Planners partners with school systems to help them achieve goals and increase their operational efficiency and effectiveness. We understand that every school system's challenges are different, which is why our specialized team of professionals is chosen based on your institution's unique needs. Whatever the challenge, Education Planners can identify and implement the appropriate solution to help you meet your ultimate objective.



James Wilson
Chief Executive Officer
jwilson@edplanners.org

James Wilson is an educational professional with over 30 years of experience leading school systems in all facets of operation including: personnel and financial management, school construction oversight and project development, technology integration, leadership training and stakeholder communications.

Mr. Wilson is currently the CEO of Education Planners, providing solutions for educational success. Education Planners is a partnership of education professionals with decades of experience leading school systems in all facets of improvement. His firm works to achieve “The classroom of tomorrow today”.

He has participated in the Harvard University Superintendent Institute, the Harvard University Institute for Educational Leaders and is a member of the Atlanta Regional Commission (ARC) for leadership institute. Mr. Wilson held central office positions in Cobb County Schools as the Assistant Superintendent of Human Resources, Deputy Superintendent and Chief Operations Officer. Mr. Wilson is a former superintendent in both Cobb and Fulton Counties. While serving as Superintendent of Schools in Fulton County, he expanded instructional technology, creating “virtual classrooms” where students take coursework in their home setting from Universities and any other high school in the county allowing for a more universal education.

Professional Organizations

AdvancED State Board of Directors
American Association of School Administrators
EdNet Superintendent Executive Board Member

Publications and Training

Leadership through Turbulent Times
Efficiency and Effectiveness
Now Let’s Think About This

Leadership Is
Purpose of Schooling
Leveraging Technology for Student Achievement



JAMES (JAY) R. DILLON III
Chief Operations Officer
jdillon@edplanners.org

Jay Dillon is currently the Chief Operating Officer for Education Planners, LLC an education consulting firm specializing in personnel management and organizational structure; personnel staff augmentation; financial management; construction management/project development; technology integration; policy development implementation; community engagement; facilitation at the executive level; and SPLOST, bond, and tax referendum preparation.

Mr. Dillon was the Director of Communication with Cobb County School District for 17 years. During that time he managed the communications staff and oversaw internal/external communications and strategic communications planning for 110,000 students and 14,500 employee school system including: district-wide publications; media relations; writer of speeches, briefings, letters, newspaper columns for the Superintendent and Board of Education; consultant/advisor as a member of the Superintendent's senior staff and executive cabinet teams; developed and produced multi-media presentations for the superintendent, executive staff and central office departments; oversaw the school district's cable access television station (COBB ed-TV); supervised the development, design and content for award-winning school district Website, www.cobbk12.org, internal Intranet site for employees and 114 individual local school Web sites; developed and implemented strategic communications outreach plan and assisted with development of district-wide strategic plan; hosted on-site communications training and developed PR training material for school-based staff; developed successful communications strategies to reach large employee and community stakeholder bases utilizing video, e-mail, text, social media, the Internet, and an automated telephone calling system; and directed four successful communications campaigns (1998, 2003, 2008 and 2012) to pass countywide one percent (1%) sales tax referenda for school construction.

Jay Dillon received his Bachelor of Arts (English) at Hampden-Sydney College, Hampden-Sydney, Virginia. He is currently Chairman of Cobb & Douglas Board of Public Health MAPP Steering

Committee, which is currently implementing a Community Health Improvement Plan. He also serves on the Board of Directors for E. Dillon and Company, Swords Creek, Virginia. Mr. Dillon was a member of Leadership Cobb, Class of 2003; Cobb Chamber of Commerce Economic Development Steering Committee; Cobb Chamber of Commerce Business-Education Steering Committee; National School Public Relations Association and the Georgia School Public Relations Association.

Mr. Dillon has received the Telly Award – “SPLOST Program” video (writer and producer); WorldFest Houston- Platinum Award – Film and Video Remi Awards and numerous Georgia School Public Relations Association Gold Awards of Excellence for website, publications and communications initiatives. He is a past member of the Rotary Club of Marietta, Cobb Symphony Orchestra – Young Patrons of the Arts Committee, Gobble Jog Charity Fun Run board member, and member of St. Anne’s Episcopal Church in Atlanta.



Linda Schultz
Principal, Education Planners, LLC

Linda Schultz is a principal with Education Planners, LLC specializing in professional training. She has more than 25 years of experience in education and advocacy for children.

Linda was as a member of the Fulton County Board of Education for over 10 years. She served as President of the Fulton County School Board for four years, and Vice-President for two years. She has also served on the Board's Audit Committee. During her presidency, the Fulton County School Board received the American School Board Journal's Magna Award in recognition of their community involvement program. They also received the Annual Award for Urban School Board Excellence from the National School Boards Association's (NSBA) Council of Urban Boards of Education (CUBE). Linda has presented at several national and state conferences on school board governance topics.

Linda joined Georgia School Council Institute in 2002. This non-profit was founded to train parents, educators, and members of the business community to improve Georgia's public schools. Their training material is still used by many school districts in Georgia to implement local school councils. The GeorgiaEducation.org website has received numerous awards for its ease of use and data analysis.

Prior to joining the school board, Linda served as Legislative Chair for the Georgia PTA, as a member of the State Standards and Grading Committee and was appointed to the bipartisan Blue Ribbon Young Driver and DUI Study Commission. Her accomplishments include securing state funding for clinic aides, increasing state funding for education, lowering class sizes, and advocating stronger teen driving laws and policies to reduce underage drinking.

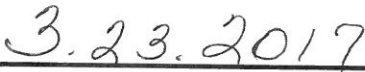
Linda's board service includes the Fulton County Schools Employees' Pension Board, Fulton Education Foundation, Georgia PTA, STAR House (Chair), and Leadership North Fulton (Chair).

Nepotism Assurance Agreement

As an instructor/trainer for Education Planners, LLC I will not provide Local Board Governance training to local board members who are immediate members of the instructor/trainer's family without obtaining prior approval from the State School Superintendent or his designee. For the purpose of this assurance, immediate family members shall include a spouse, child, sibling, parent or the spouse of a child, sibling or parent.



Sign



Date

Education Planners, LLC
Organization

Nepotism Assurance Agreement

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John R. Dill III

Sign

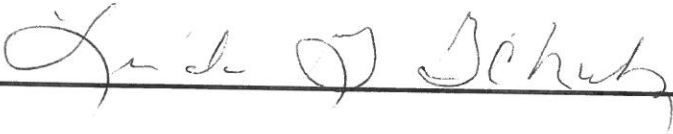
3/23/17

Date

Education Planners, LLC
Organization

Nepotism Assurance Agreement

As an instructor/trainer for Education Planners, LLC I will not provide Local Board Governance training to local board members who are immediate members of the instructor/trainer's family without obtaining prior approval from the State School Superintendent or his designee. For the purpose of this assurance, immediate family members shall include a spouse, child, sibling, parent or the spouse of a child, sibling or parent.



Sign



Date

Education Planners, LLC
Organization

COURSE 1

*Roles and Responsibilities
of the Board of Education*

Training Provider	Education Planners, LLC	Submission Date	5/3/2017
Course Title	<i>Roles and Responsibilities of the Board of Education</i>	Instructors	James Wilson Linda Schultz
Course Description	As state and federal education laws become more complex, and economic conditions place unprecedented strains on school district operating budgets, the role of the school board member has never been more critical. This course will train both new and experienced school board members to clearly understand and fulfill their positions in the decision-making process, as defined by state and local laws and board policy. Additionally, board members will learn key components of board continuity, intra-board relations and effectiveness, as well as transparent governance and community relations.	Delivery Method	<ul style="list-style-type: none"> • Large Group • Whole Board
Alignment to Standards	Domain I: Governance Structure Domain III: Board & Community Relations Domain IV: Policy Development Domain V: Board Meetings Domain VII: Ethics	Proposed Fee	Negotiated
Proposed Location	As determined by LBOE	Length of Course	Six hours
Overall Course Objectives	Enable all local school board members and potential candidates to meet requirements of 20-2-51(e) eligibility for local board election.		
Submitted by	James Wilson		

Roles and Responsibilities of the Board of Education

Syllabus

Submitting Agency: Education Planners, LLC

Course Title: Roles and Responsibilities of the Board of Education

Contact: James Wilson

CEO

jwilson@edplanners.org

678-576-5333

Course Description: As state and federal education laws become more complex, and economic conditions place unprecedented strains on school district operating budgets, the role of the school board member has never been more critical. This course will train both new and experienced school board members to clearly understand and fulfill their positions in the decision-making process, as defined by state and local laws and board policy. Additionally, board members will learn key components of board continuity, intra-board relations and effectiveness, as well as transparent governance and community relations.

Contact Hours: Six hours

Major Activities: Education Planners, LLC, is offering board members two options for participation in this course:

1. **Distance Learning – Whole Group:** Board members will receive training in a whole-group setting via live videoconference with trainers. Relevant documents and materials will be available online.
2. **Lecture – Whole Group:** Training will take place at a location selected by the LBOE in a large group/whole board lecture format. Instruction will include group activities and case studies, with appropriate reference material and documents provided.

Training Goals/Objectives:

- Meet the statutory training topic requirements;
- Do so in a manner consistent with BOE standard;
- Strengthen and create more effective Board of Education governance

Target Audience:

New and veteran board members

Training Times:

To be determined by LBOE, but proposed schedule will include two days of instruction, three hours each day

Dates/Locations:

To be determined by LBOE

Additional Faculty:

Additional faculty will be selected as needed and according to subject matter expertise: locally, statewide or nationally

Registration Fees:

Negotiated

COURSE EVALUATION

- I. Please rate this training in terms of **Trainer's Expertise, Clarity, Time Management, and Responsiveness** to your educational needs. Provide any additional feedback in the **Comments** section. Circle the appropriate numbers.

RATING SCALE: 1 = LOW 3 = MEDIUM 5 = HIGH

Trainer Name(s)	Expertise					Clarity					Time Management					Responsiveness				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

- II. Please take a moment to answer the following questions.
- a. What will you do **differently** as a result of this training?
 - b. What do you feel were the **strengths** of this presentation?
 - c. What do you feel were the **weaknesses** of this presentation?
 - d. How can we **improve** this presentation?

- III. Please rate the following statements using a 1 through 5 scale where:
1 = Disagree Strongly 5 = Agree Strongly

- _____ The **difficulty level** was about right.
- _____ I can **apply the information** in my practice/service setting.
- _____ The presentation met my professional **educational needs**.
- _____ The trainer **actively involved** me in the learning process.
- _____ As a result of this training, I feel **more confident** in my capacity as a board member.

COURSE 2

Maintaining An Effective Workforce

Training Provider	Education Planners, LLC	Submission Date	5/3/2017
Course Title	<i>Maintaining An Effective Workforce</i>	Instructors	James Wilson Linda Schultz
Course Description	This course covers the board member's role in setting effective personnel policy, including: developing the superintendent's job description; developing professional development and evaluation plans for the superintendent; determining expectations for the superintendent according to a school district's strategic plan; developing a comprehensive evaluation instrument; and developing effective personnel policies consistent with state law	Delivery Method	<ul style="list-style-type: none"> • Individual • Large Group • Whole Board
Alignment to Standards	Domain IV: Policy Development Domain VI: Personnel Doman VII: Ethics	Proposed Fee	Negotiated
Proposed Location	As determined by LBOE	Length of Course	Three hours
Overall Course Objectives	Enable all local school board members and potential candidates to meet requirements of 20-2-51(e) eligibility for local board election.		
Submitted by	James Wilson		

Maintaining An Effective Workforce

Syllabus

Submitting Agency: Education Planners, LLC

Course Title: Maintaining An Effective Workforce

Contact: James Wilson

CEO

jwilson@edplanners.org

678-576-5333

Course Description: This course covers the board member's role in setting effective personnel policy, including: developing the superintendent's job description; developing professional development and evaluation plans for the superintendent; determining expectations for the superintendent according to a school district's strategic plan; developing a comprehensive evaluation instrument; and developing effective personnel policies consistent with state law

Contact Hours: Three hours

Major Activities: Education Planners, LLC, is offering board members three options for participation in this course:

1. **Distance Learning – Whole Group:** Board members will receive training in a whole-group setting via live videoconference with trainers. Relevant documents and materials will be available online.
2. **Distance Learning – Individual:** Board members will receive training individually at a time of their choosing by viewing an online instructional video and completing related course assessment.
3. **Lecture – Whole Group:** Training will take place at a location selected by the LBOE in a large group/whole board lecture format. Instruction will include group activities and case studies, with appropriate reference material and documents provided.

Training Goals/Objectives:

- Meet the statutory training topic requirements;
- Do so in a manner consistent with BOE standard;
- Board members trained to implement and monitor effective personnel policy.

Target Audience: New and veteran board members

Training Times: To be determined by LBOE, but proposed schedule will include three hours of training

Dates/Locations: To be determined by LBOE

Additional Faculty: Additional faculty will be selected as needed and according to subject matter expertise: locally, statewide or nationally

Registration Fees: Negotiated

COURSE EVALUATION

IV. Please rate this training in terms of **Trainer's Expertise, Clarity, Time Management, and Responsiveness** to your educational needs. Provide any additional feedback in the **Comments** section. Circle the appropriate numbers.

RATING SCALE: 1 = LOW 3 = MEDIUM 5 = HIGH

Trainer Name(s)	Expertise					Clarity					Time Management					Responsiveness				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

V. Please take a moment to answer the following questions.

- e. What will you do **differently** as a result of this training?
- f. What do you feel were the **strengths** of this presentation?
- g. What do you feel were the **weaknesses** of this presentation?
- h. How can we **improve** this presentation?

VI. Please rate the following statements using a 1 through 5 scale where:

1 = Disagree Strongly 5 = Agree Strongly

- _____ The **difficulty level** was about right.
- _____ I can **apply the information** in my practice/service setting.
- _____ The presentation met my professional **educational needs**.
- _____ The trainer **actively involved** me in the learning process.
- _____ As a result of this training, I feel **more confident** in my capacity as a board member.

COURSE 3

Financial Governance

Training Provider	Education Planners, LLC	Submission Date	5/3/2017
Course Title	<i>Financial Governance</i>	Instructors	James Wilson Linda Schultz
Course Description	This course covers the board member's role as it relates to the school district budget, including providing appropriate budget guidance for the superintendent, budget review, public input, setting a millage rate and the numerous considerations involved in final budget adoption. Additionally, board members will learn the critical components of monitoring district audits and reviewing monthly and quarterly financial reports.	Delivery Method	<ul style="list-style-type: none"> • Individual • Large Group • Whole Board
Alignment to Standards	Domain IV: Policy Development Domain VII: Financial Governance Doman VIII: Ethics	Proposed Fee	Negotiated
Proposed Location	As determined by LBOE	Length of Course	Three hours
Overall Course Objectives	Enable all local school board members and potential candidates to meet requirements of 20-2-51(e) eligibility for local board election.		
Submitted by	James Wilson		

Financial Governance

Syllabus

Submitting Agency: Education Planners, LLC

Course Title: Financial Governance

Contact: James Wilson

CEO

jwilson@edplanners.org

678-576-5333

Course Description: This course covers the board member's role as it relates to the school district budget, including providing appropriate budget guidance for the superintendent, budget review, public input, setting a millage rate and the numerous considerations involved in final budget adoption. Additionally, board members will learn the critical components of monitoring district audits and reviewing monthly and quarterly financial reports.

Contact Hours: Three hours

Major Activities: Education Planners, LLC, is offering board members three options for participation in this course:

4. **Distance Learning – Whole Group:** Board members will receive training in a whole-group setting via live videoconference with trainers. Relevant documents and materials will be available online.
5. **Distance Learning – Individual:** Board members will receive training individually at a time of their choosing by viewing an online instructional video and completing related course assessment.
6. **Lecture – Whole Group:** Training will take place at a location selected by the LBOE in a large group/whole board lecture format. Instruction will include group activities and case studies, with appropriate reference material and documents provided.

Training Goals/Objectives:

- Meet the statutory training topic requirements;
- Do so in a manner consistent with BOE standard;
- Board members trained in budget adoption and oversight, including ongoing fiscal monitoring.

Target Audience:

New and veteran board members

Training Times:

To be determined by LBOE, but proposed schedule will include three hours of training

Dates/Locations:

To be determined by LBOE

Additional Faculty:

Additional faculty will be selected as needed and according to subject matter expertise: locally, statewide or nationally

Registration Fees:

Negotiated

COURSE EVALUATION

VII. Please rate this training in terms of **Trainer's Expertise, Clarity, Time Management, and Responsiveness** to your educational needs. Provide any additional feedback in the **Comments** section. Circle the appropriate numbers.

RATING SCALE: 1 = LOW 3 = MEDIUM 5 = HIGH

Trainer Name(s)	Expertise					Clarity					Time Management					Responsiveness				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
		1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

- VIII. Please take a moment to answer the following questions.
- i. What will you do **differently** as a result of this training?
 - j. What do you feel were the **strengths** of this presentation?
 - k. What do you feel were the **weaknesses** of this presentation?
 - l. How can we **improve** this presentation?

IX. Please rate the following statements using a 1 through 5 scale where:
1 = Disagree Strongly 5 = Agree Strongly

- _____ The **difficulty level** was about right.
- _____ I can **apply the information** in my practice/service setting.
- _____ The presentation met my professional **educational needs**.
- _____ The trainer **actively involved** me in the learning process.
- _____ As a result of this training, I feel **more confident** in my capacity as a board member.

COURSE 4

New Board or Board Member Training

Training Provider	Education Planners, LLC	Submission Date	5/3/2017
Course Title	<i>New Board Member or Board Member</i>	Instructors	James Wilson Linda Schultz
Course Description	This course provides an overview of the Standards for Effective Governance of Georgia Nonprofit Charter School Governing Boards	Delivery Method	<ul style="list-style-type: none"> • Large Group • Whole Board
Alignment to Standards	This course is aligned to all standards. Attendees will meet the training requirements of SBOE Rule 160-4-9-.06	Proposed Fee	Negotiated
Proposed Location	<ul style="list-style-type: none"> • Charter school (onsite) • Other space as agreed upon by attendees 	Length of Course	Fifteen hours
Overall Course Objectives	Develop an understanding of the roles and responsibilities of highly effective governance boards	Type of Charter School	<ul style="list-style-type: none"> • Start-up • Conversion
Submitted by	James Wilson	Date Submitted	5/3/2017

New Board or Board Member Training Course Syllabus

Syllabus

Submitting Agency:	Education Planners, LLC
Course Title:	Building a Highly Effective Governance Team – Training for New Boards and New Board Members
Contact:	James Wilson CEO jwilson@edplanners.org 678-576-5333
Course Description:	This course provides an overview of the Standards for Effective Governance of Georgia Nonprofit Charter School Governing Boards.
Contact Hours:	Fifteen hours
Major Activities:	Major topics include: <ul style="list-style-type: none">▪ Characteristics of Effective Governance Boards▪ Board Structure and Responsibilities (including Ethics and Conflicts of Interest)▪ The Relationship Between Board Members and the School Leader▪ The Board Role in Strategic Planning▪ Governing Through Board Policies▪ Providing Financial Strength and Oversight▪ Engaging Parents and the Community▪ Holding Productive Board Meetings (including Open Meetings, Open Records and other legal requirements)

Instruction may include large and small group activities; role playing; case studies; videos, and individual activities

Training Goals/Objectives: Board members and the school leader will agree on their respective roles in the governing process.

The Governance Team will complete a self-assessment on the Standards for Effective Governance, and develop a draft work plan.

Target Audience: New Start-up Charter Boards New Conversion Charter Boards, New Board Members.

Training Times: 2-day minimum

Dates/Locations: To be determined by LBOE

Additional Faculty: Additional faculty will be selected as needed and according to subject matter expertise: locally, statewide or nationally

Registration Fees: Negotiated

COURSE EVALUATION

- X. Please rate this training in terms of **Trainer's Expertise, Clarity, Time Management, and Responsiveness** to your educational needs. Provide any additional feedback in the **Comments** section. Circle the appropriate numbers.

RATING SCALE: 1 = LOW 3 = MEDIUM 5 = HIGH

Trainer Name(s)	Expertise					Clarity					Time Management					Responsiveness				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

- XI. Please take a moment to answer the following questions.
- m. What will you do **differently** as a result of this training?
 - n. What do you feel were the **strengths** of this presentation?
 - o. What do you feel were the **weaknesses** of this presentation?
 - p. How can we **improve** this presentation?

- XII. Please rate the following statements using a 1 through 5 scale where:
1 = Disagree Strongly 5 = Agree Strongly

- _____ The **difficulty level** was about right.
- _____ I can **apply the information** in my practice/service setting.
- _____ The presentation met my professional **educational needs**.
- _____ The trainer **actively involved** me in the learning process.
- _____ As a result of this training, I feel **more confident** in my capacity as a board member.

COURSE 5

Whole Board Training Course Proposal

Training Provider	Education Planners, LLC	Submission Date	5/3/2017
Course Title	<i>Building a Highly Effective Governance Team – Whole Board Training</i>	Instructors	James Wilson Linda Schultz
Course Description	This course guides members through a self-assessment on the Standards for Effective Governance of Georgia Nonprofit Charter School Governing Boards	Delivery Method	<ul style="list-style-type: none"> • Whole Board
Alignment to Standards	This course is aligned to all standards. Attendees will meet the training requirements of SBOE Rule 160-4-9-.06	Proposed Fee	Negotiated
Proposed Location	<ul style="list-style-type: none"> • Charter school (onsite) • Other space as agreed upon by attendees 	Length of Course	Three-hour minimum
Overall Course Objectives	The Governance Team will complete a self-assessment on the Standards for Effective Governance and draft an improvement plan	Type of Charter School	<ul style="list-style-type: none"> • Start-up • Conversion
Submitted by	James Wilson	Date Submitted	5/3/2017

New Board or Board Member Training Course Syllabus

Syllabus

Submitting Agency: Education Planners, LLC

Course Title: Building a Highly Effective Governance Team – Whole Board Training

Contact: James Wilson

CEO

jwilson@edplanners.org

678-576-5333

Course Description: This course guides board members through a self-assessment on the Standards for Effective Governance of Georgia Nonprofit Charter School Governing Boards. Attendees will meet the training requirements of SBOE Rule 160-4-9-.06

Contact Hours: Three-hour minimum

Major Activities: The Governance Team will assess their progress towards meeting each standard. An improvement plan will be developed which includes additional training requirements.

Instruction may include large group discussion, role-playing; case studies; videos, individual activities, and a self-assessment tool.

Training Goals/Objectives: Board members and the school leader will agree on their respective roles in the governing process.

The Governance Team will complete a self-assessment on the Standards for Effective Governance, and develop a draft improvement plan.

Board members will develop their training plan.

Target Audience: Start-up Charter Boards and Conversion Charter Boards

Training Times: Three-hour minimum

Dates/Locations: To be determined by LBOE

Additional Faculty: Additional faculty will be selected as needed and according to subject matter expertise: locally, statewide or nationally

Registration Fees: Negotiated

COURSE EVALUATION

XIII. Please rate this training in terms of **Trainer’s Expertise, Clarity, Time Management, and Responsiveness** to your educational needs. Provide any additional feedback in the **Comments** section. Circle the appropriate numbers.

RATING SCALE: 1 = LOW 3 = MEDIUM 5 = HIGH

Trainer Name(s)	Expertise					Clarity					Time Management					Responsiveness				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

- XIV. Please take a moment to answer the following questions.
- q. What will you do **differently** as a result of this training?
 - r. What do you feel were the **strengths** of this presentation?
 - s. What do you feel were the **weaknesses** of this presentation?
 - t. How can we **improve** this presentation?

XV. Please rate the following statements using a 1 through 5 scale where:
1 = Disagree Strongly 5 = Agree Strongly

- _____ The **difficulty level** was about right.
- _____ I can **apply the information** in my practice/service setting.
- _____ The presentation met my professional **educational needs**.
- _____ The trainer **actively involved** me in the learning process.
- _____ As a result of this training, I feel **more confident** in my capacity as a board member.

COURSE 6

Strategic Planning Training Course

Training Provider	Education Planners, LLC	Submission Date	5/3/2017
Course Title	<i>Strategic Planning for Charter School Governing Boards</i>	Instructors	James Wilson Linda Schultz
Course Description	This course outlines a strategic planning process that results in an adopted school strategic plan designed to improve student achievement and organizational effectiveness	Delivery Method	<ul style="list-style-type: none"> • Whole Board
Alignment to Standards	Domain I: A, B; Domain II: A, B; Domain III: A, B	Proposed Fee	Negotiated
Proposed Location	<ul style="list-style-type: none"> • Charter school (onsite) • Other space as agreed upon by attendees 	Length of Course	Six Hours
Overall Course Objectives	The Governance Team will complete a work plan and time table for the strategic planning process.	Type of Charter School	<ul style="list-style-type: none"> • Start-up • Conversion
Submitted by	James Wilson	Date Submitted	5/3/2017

Strategic Planning Training Course

Syllabus

Submitting Agency: Education Planners, LLC

Course Title: Strategic Planning for Charter School Governance Boards

Contact: James Wilson

CEO

jwilson@edplanners.org

678-576-5333

Course Description: This course outlines a strategic planning process that results in an adopted school strategic plan designed to improve student achievement and organizational effectiveness. Attendees will receive training credit hours as outlined in SBOE Rule 160-4-9-.06

Contact Hours: Six hours (recommended)

Major Activities: Major topics include:

- The role of the Board in strategic thinking
- Major steps in the planning process
- Involving the community
- Monitoring and reporting progress
- Aligning the budget and school leader evaluation with the plan

Instruction may include large and small group activities; role playing; case studies; videos, and individual activities

Training Goals/Objectives: Board members and the school leader will agree on their respective roles in the governing process.

The Governance Team will complete a work plan for the strategic planning process.

Target Audience: New Start-up Charter Boards New Conversion Charter Boards, New Board Members.

Training Times: 2-day minimum
Dates/Locations: To be determined by LBOE
Additional Faculty: Additional faculty will be selected as needed and according to subject matter expertise: locally, statewide or nationally
Registration Fees: Negotiated

COURSE EVALUATION

XVI. Please rate this training in terms of **Trainer's Expertise, Clarity, Time Management, and Responsiveness** to your educational needs. Provide any additional feedback in the **Comments** section. Circle the appropriate numbers.

RATING SCALE: 1 = LOW 3 = MEDIUM 5 = HIGH

Trainer Name(s)	Expertise					Clarity					Time Management					Responsiveness				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
		1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4

- XVII. Please take a moment to answer the following questions.
- u. What will you do **differently** as a result of this training?
 - v. What do you feel were the **strengths** of this presentation?
 - w. What do you feel were the **weaknesses** of this presentation?
 - x. How can we **improve** this presentation?

XVIII. Please rate the following statements using a 1 through 5 scale where:
1 = Disagree Strongly 5 = Agree Strongly

- _____ The **difficulty level** was about right.
- _____ I can **apply the information** in my practice/service setting.
- _____ The presentation met my professional **educational needs**.
- _____ The trainer **actively involved** me in the learning process.
- _____ As a result of this training, I feel **more confident** in my capacity as a board member.

REFERENCES

The International School of Smyrna
Cheryl Wilson
2144 South Cobb Drive
Smyrna, GA 30080
cwilson@iasmyrna.org
770.757.1415

International Charter of Atlanta
Marisa Kashapov, Board President
Marisa.kashapov@gmail.com

The charter schools we have conducted board training with between 2014 and 2017 are:

Chamblee Charter School
International Charter School of Atlanta
International Charter School of Smyrna.

COURSE EVALUATION

- I. Please rate this training in terms of **Trainer's Expertise, Clarity, Time Management, and Responsiveness** to your educational needs. Provide any additional feedback in the **Comments** section. Circle the appropriate numbers.

RATING SCALE: 1 = LOW 3 = MEDIUM 5 = HIGH

Trainer Name(s)	Expertise					Clarity					Time Management					Responsiveness				
Linda Schultz	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

- II. Please take a moment to answer the following questions.
- a. What will you do **differently** as a result of this training? *GB meetings handling, policies, strat. plan*
 - b. What do you feel were the **strengths** of this presentation? *good material, facts, suggestions*
 - c. What do you feel were the **weaknesses** of this presentation?
 - d. How can we **improve** this presentation?

- III. Please rate the following statements using a 1 through 5 scale where:
1 = Disagree Strongly 5 = Agree Strongly

- 5 The **difficulty level** was about right.
- 5 I can **apply the information** in my practice/service setting.
- 5 The presentation met my professional **educational needs**.
- 5 The trainer **actively involved** me in the learning process.
- 5 As a result of this training, I feel **more confident** in my capacity as a board member.

COURSE EVALUATION

- I. Please rate this training in terms of **Trainer's Expertise, Clarity, Time Management,** and **Responsiveness** to your educational needs. Provide any additional feedback in the **Comments** section. Circle the appropriate numbers.

RATING SCALE: 1 = LOW 3 = MEDIUM 5 = HIGH

Trainer Name(s)	Expertise					Clarity					Time Management					Responsiveness				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

- II. Please take a moment to answer the following questions.
- What will you do **differently** as a result of this training?
Strategic Planning
 - What do you feel were the **strengths** of this presentation?
Explanation of the topics
 - What do you feel were the **weaknesses** of this presentation?
Time Mgt.
 - How can we **improve** this presentation?
Very well presented

- III. Please rate the following statements using a 1 through 5 scale where:
1 = Disagree Strongly 5 = Agree Strongly

- 5 The **difficulty level** was about right.
- 5 I can **apply the information** in my practice/service setting.
- 5 The presentation met my professional **educational needs**.
- 5 The trainer **actively involved** me in the learning process.
- 5 As a result of this training, I feel **more confident** in my capacity as a board member.

COURSE EVALUATION

- I. Please rate this training in terms of **Trainer's Expertise, Clarity, Time Management, and Responsiveness** to your educational needs. Provide any additional feedback in the **Comments** section. Circle the appropriate numbers.

RATING SCALE: 1 = LOW 3 = MEDIUM 5 = HIGH

Trainer Name(s)	Expertise					Clarity					Time Management					Responsiveness				
Linda Schultz	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

- II. Please take a moment to answer the following questions.
- a. What will you do **differently** as a result of this training?
Diligently consider content of communications
 - b. What do you feel were the **strengths** of this presentation?
Open Mtg Discussion
 - c. What do you feel were the **weaknesses** of this presentation?
Length of Sessions
 - d. How can we **improve** this presentation?
Consider 3 shorter sessions

- III. Please rate the following statements using a 1 through 5 scale where:
1 = Disagree Strongly 5 = Agree Strongly

- 5 The **difficulty level** was about right.
- 5 I can **apply the information** in my practice/service setting.
- 5 The presentation met my professional **educational needs**.
- 5 The trainer **actively involved** me in the learning process.
- 5 As a result of this training, I feel **more confident** in my capacity as a board member.



COURSE EVALUATION

- I. Please rate this training in terms of **Trainer's Expertise, Clarity, Time Management, and Responsiveness** to your educational needs. Provide any additional feedback in the **Comments** section. Circle the appropriate numbers.

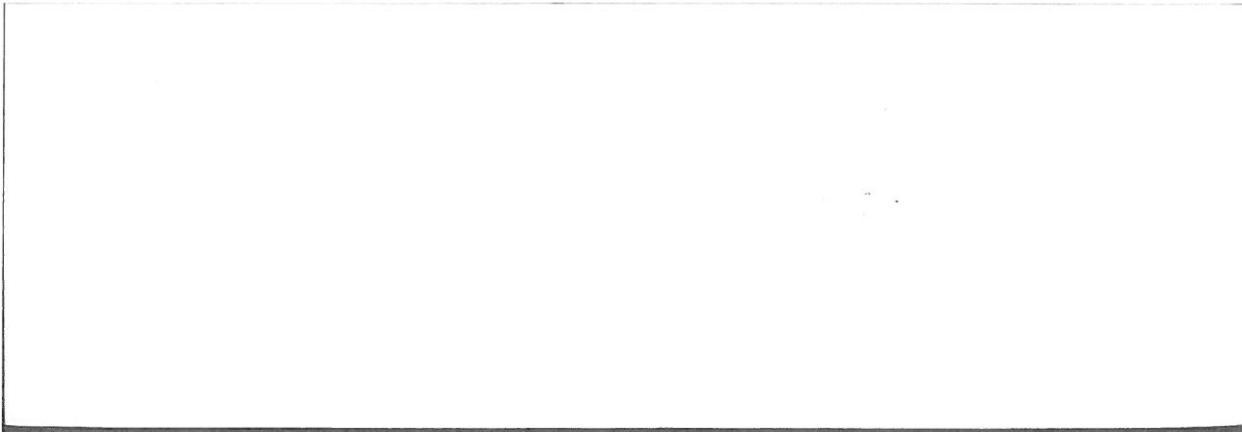
RATING SCALE: 1 = LOW 3 = MEDIUM 5 = HIGH

Trainer Name(s)	Expertise					Clarity					Time Management					Responsiveness				
Linda Schultz	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

- II. Please take a moment to answer the following questions.
- a. What will you do **differently** as a result of this training?
develop a strategic framework
 - b. What do you feel were the **strengths** of this presentation?
practicality
 - c. What do you feel were the **weaknesses** of this presentation?
 - d. How can we **improve** this presentation?
time management

- III. Please rate the following statements using a 1 through 5 scale where:
1 = Disagree Strongly 5 = Agree Strongly

- 5 The **difficulty level** was about right.
- 4 I can **apply the information** in my practice/service setting.
- 5 The presentation met my professional **educational needs**.
- 5 The trainer **actively involved** me in the learning process.
- 2 As a result of this training, I feel **more confident** in my capacity as a board member.



COURSE EVALUATION

- I. Please rate this training in terms of **Trainer's Expertise, Clarity, Time Management,** and **Responsiveness** to your educational needs. Provide any additional feedback in the **Comments** section. Circle the appropriate numbers.

RATING SCALE: 1 = LOW 3 = MEDIUM 5 = HIGH

Trainer Name(s)	Expertise					Clarity					Time Management					Responsiveness				
<i>Linda Shultz</i>	1	2	3	4	(5)	1	2	3	4	(5)	1	2	3	4	(5)	1	2	3	4	(5)
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

- II. Please take a moment to answer the following questions.
- a. What will you do **differently** as a result of this training?
 - b. What do you feel were the **strengths** of this presentation?
related specifically to our charter needs
 - c. What do you feel were the **weaknesses** of this presentation?
 - d. How can we **improve** this presentation?

- III. Please rate the following statements using a 1 through 5 scale where:
1 = Disagree Strongly 5 = Agree Strongly

- 5 The **difficulty level** was about right.
- 5 I can **apply the information** in my practice/service setting.
- 5 The presentation met my professional **educational needs**.
- 5 The trainer **actively involved** me in the learning process.
- N/A As a result of this training, I feel **more confident** in my capacity as a board member.

COURSE EVALUATION

- I. Please rate this training in terms of **Trainer's Expertise, Clarity, Time Management, and Responsiveness** to your educational needs. Provide any additional feedback in the **Comments** section. Circle the appropriate numbers.

RATING SCALE: 1 = LOW 3 = MEDIUM 5 = HIGH

Trainer Name(s)	Expertise					Clarity					Time Management					Responsiveness				
Winda Schultz	1	2	3	4	(5)	1	2	3	(4)	5	1	2	3	(4)	5	1	2	3	4	(5)
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

- II. Please take a moment to answer the following questions.
- a. What will you do **differently** as a result of this training? *Be a more informed/prepared board member*
 - b. What do you feel were the **strengths** of this presentation? *Content/Information presented*
 - c. What do you feel were the **weaknesses** of this presentation? *Length*
 - d. How can we **improve** this presentation? *More interactive/group activities to apply the concepts being covered*

- III. Please rate the following statements using a 1 through 5 scale where:
1 = Disagree Strongly 5 = Agree Strongly

- 5 The **difficulty level** was about right.
- 5 I can **apply the information** in my practice/service setting.
- 5 The presentation met my professional **educational needs**.
- 4 The trainer **actively involved** me in the learning process.
- 5 As a result of this training, I feel **more confident** in my capacity as a board member.

COURSE EVALUATION

- I. Please rate this training in terms of **Trainer's Expertise, Clarity, Time Management, and Responsiveness** to your educational needs. Provide any additional feedback in the **Comments** section. Circle the appropriate numbers.

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Trainer Name(s)	Expertise					Clarity					Time Management					Responsiveness				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
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- II. Please take a moment to answer the following questions.
- a. What will you do **differently** as a result of this training?
 - b. What do you feel were the **strengths** of this presentation?
 - c. What do you feel were the **weaknesses** of this presentation?
 - d. How can we **improve** this presentation?

- III. Please rate the following statements using a 1 through 5 scale where:
1 = Disagree Strongly 5 = Agree Strongly

- 4 The **difficulty level** was about right.
- 5 I can **apply the information** in my practice/service setting.
- 5 The presentation met my professional **educational needs**.
- 5 The trainer **actively involved** me in the learning process.
- 4 As a result of this training, I feel **more confident** in my capacity as a board member.

COURSE EVALUATION

- I. Please rate this training in terms of **Trainer's Expertise, Clarity, Time Management, and Responsiveness** to your educational needs. Provide any additional feedback in the **Comments** section. Circle the appropriate numbers.

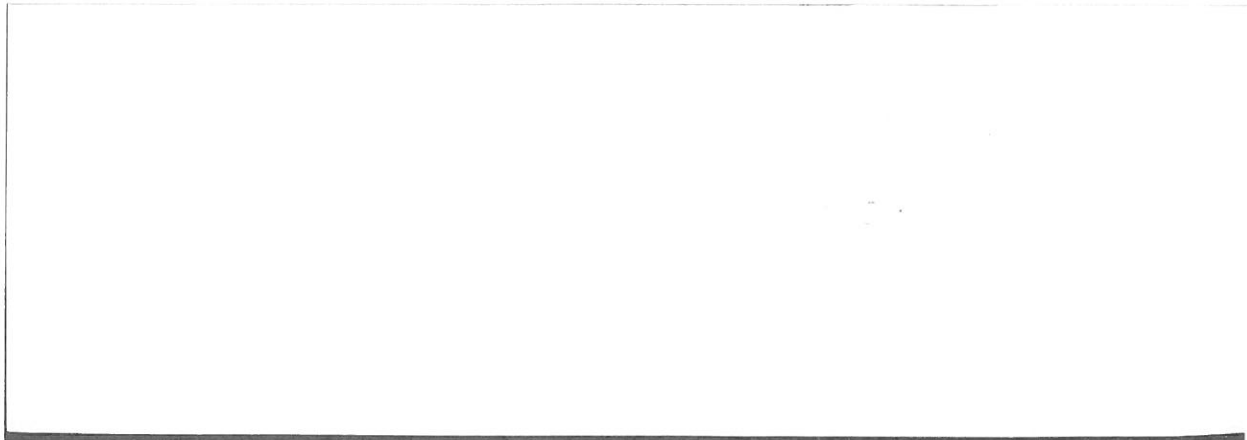
RATING SCALE: 1 = LOW 3 = MEDIUM 5 = HIGH

Trainer Name(s)	Expertise					Clarity					Time Management					Responsiveness				
Linda Schulz	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

- II. Please take a moment to answer the following questions.
- a. What will you do **differently** as a result of this training?
Brush up on state regulations
 - b. What do you feel were the **strengths** of this presentation?
practical experience & examples
 - c. What do you feel were the **weaknesses** of this presentation?
Too much time on marginally relevant portions
 - d. How can we **improve** this presentation?
streamline it

- III. Please rate the following statements using a 1 through 5 scale where:
1 = Disagree Strongly 5 = Agree Strongly

- 4 The **difficulty level** was about right.
- 4 I can **apply the information** in my practice/service setting.
- 4 The presentation met my professional **educational needs**.
- 5 The trainer **actively involved** me in the learning process.
- 4 As a result of this training, I feel **more confident** in my capacity as a board member.



COURSE EVALUATION

- I. Please rate this training in terms of **Trainer's Expertise, Clarity, Time Management, and Responsiveness** to your educational needs. Provide any additional feedback in the **Comments** section. Circle the appropriate numbers.

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	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

- II. Please take a moment to answer the following questions.
- What will you do **differently** as a result of this training?
Great
 - What do you feel were the **strengths** of this presentation?
Great
 - What do you feel were the **weaknesses** of this presentation?
None
 - How can we **improve** this presentation?
Great

- III. Please rate the following statements using a 1 through 5 scale where:
1 = Disagree Strongly 5 = Agree Strongly

- 5 The **difficulty level** was about right.
- 5 I can **apply the information** in my practice/service setting.
- 5 The presentation met my professional **educational needs**.
- 5 The trainer **actively involved** me in the learning process.
- 5 As a result of this training, I feel **more confident** in my capacity as a board member.

Gov. Bd. Trng.

~~SOFT~~ SOFT COPY OF PRESENTATION

Name	EMAIL ADDRESS
1 Kathy Wilson-chu	Kathywilsonchu@gmail.com
2 JOE ANI	JOE482@GMAIL.COM
3 MATT DICKINSON	MATTHEW.F.DICKINSON@FMAIL.COM
4 Nancy Kelly	drewkellyatl@bellsouth.net
5 Delicia Grimmesey	deliciagrimm@comcast.net
6 UDAY KUMAR	uday.kumar@comcast.net
7 Greg Sale	gms2026@gmail.com
8 DARRON KUSMAN	darron@roma-ventures.com
9 Matthew Harrison	Matthew_harrison@cabl.comcast.com
10	
11 Steve Harmon	swharmon@gmail.com
12. Norman Sauce	NORMAN-C-SAUCE@DEKULBSCHOOLS GA.019

COURSE EVALUATION

I. Please rate this training in terms of Trainer's Expertise, Clarity, Time Management, and Responsiveness to your educational needs. Provide any additional feedback in the Comments section. Circle the appropriate numbers.

RATING SCALE: 1 = LOW 3 = MEDIUM 5 = HIGH

Trainer Name(s)	Expertise					Clarity					Time Management					Responsiveness				
Linda Schulz	1	2	3	4	(5)	1	2	3	4	(5)	1	2	3	4	(5)	1	2	3	4	(5)
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

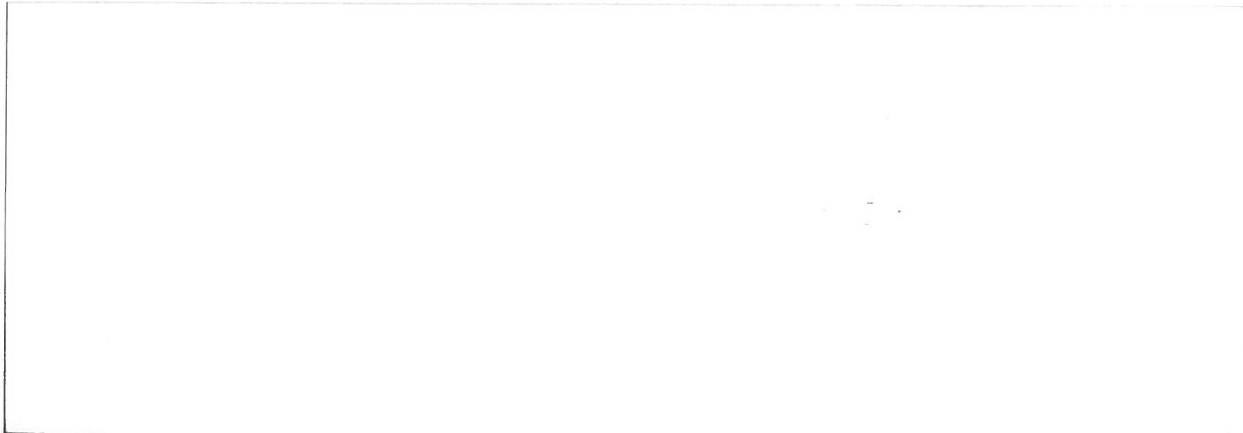
II. Please take a moment to answer the following questions.

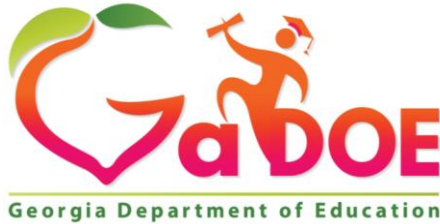
- a. What will you do differently as a result of this training?
- b. What do you feel were the strengths of this presentation? - tailored to CCHS needs, Linda's wonderful experience/background made it very worthwhile.
- c. What do you feel were the weaknesses of this presentation? not enough chocolate
- d. How can we improve this presentation? n/a

III. Please rate the following statements using a 1 through 5 scale where:

1 = Disagree Strongly 5 = Agree Strongly

- 5 The difficulty level was about right.
- 5 I can apply the information in my practice/service setting.
- 5 The presentation met my professional educational needs.
- 5 The trainer actively involved me in the learning process.
- 5 As a result of this training, I feel more confident in my capacity as a board member.





Richard Woods, Georgia's School Superintendent

"Educating Georgia's Future"

Please provide responses to all three hypothetical questions given below.

Hypothetical #1 – You are working with Charter School XYZ's founding board that is comprised of mostly parents. The school is in its first year of operation. The board has hired a principal and the principal has hired a staff. The school is located in a wealthy part of town and does not provide transportation. As a result, the students are majority high income. The board has issues with the way that the teachers are trained and on-boarded onto the staff. The board also has concerns that their Principal is not handling carpool well. Some teachers are complaining that the principal is too strict. Lastly, the facility has had many issues and concerns including a leaky roof. As a result of all of these things, the board is meeting today to consider firing the principal. Also one board member is related to a teacher.

- How would you advise this board in terms of duties, roles and responsibilities, and next steps?
- What are some considerations moving forward to avoid these conflicts?

Hypothetical #2 – A well-established charter school has recently come under public scrutiny for not reflecting the diversity of the community served by the charter school. The school has decent student achievement data, and has been in existence for over ten years. The board does not believe that there is anything it can do to diversify. It also believes that it does not need to diversify. The board is about half parents and half other community members.

- What would you do with this board and why?
- What are the issues here?

Hypothetical #3 – An established charter school is having some serious board turnover in a way that is unprecedented. You are the board's trainer. You attend a board meeting and notice that there is not any real discussion. The items pass without any questions or comments. There is not time for public comment. The principal's report is sparse and does not include any academic data. Additionally, the CFO was unable to answer questions about the financial documents. When asked questions, the principal spoke up to answer questions about the financial statements. Several board members seem to have a very friendly demeanor with the principal.

- What are your thoughts on this?
- What are some suggestions you would make to the board?
- How would you incorporate this into the training?

Hypothetical #1

It is always helpful and responsible to remind boards of their training. We complete our training with the understanding training will be on-going. We will come back during the year to remind ourselves, refresh, and review our responsibilities. Our roles and responsibilities course work provides an “understanding of the terms”.

Examples:

Board - The Board’s role is one of governance, setting the direction and establishing goals for the school. The school board is the governance team.

Governance – As defined in Georgia’s School Keys, Governance is “the organizational structure, learning environment, and academic achievement of all learners’ function as the central focus of school planning and management.”

Leadership – Jim Kouzes and Barry Posner definition of leadership, “Leadership is the art of mobilizing others to want to struggle for shared aspirations,” Take out the two words “want to” and you’ll understand the essence of leadership.

The school administrative team is the management team, the school board the governance team; they have separate and distinct roles, these two teams working in unison and each respecting each other’s roles for the leadership team.

The table below is designed to help visualize during the training.

SCHOOL BOARD	SCHOOL ADMINISTRATION
GOVERNS (Guides, Directs)	MANAGES (Administers, Operates)
Decides What	Decides How
Requests Information	Seeks and Provides Information
Considers Issues	Provides Recommendations
Creates, Reviews and Adopts Policy	Recommends and Carries Out Policy
Approves and Reviews Plans	Implements Plans
Monitors Progress	Reports Progress
Contracts with Personnel	Supervises Hiring Process and Practice
Approves Evaluation Criteria and Procedures	Supervises and Evaluates Personnel
Approves and Reviews Budget	Formulates Budget
Represents Public Interest	Acts in Public Interest

Often times we are asked after the training to serve in an advisement capacity. This hypothetical question is a similar scenario issue for boards, especially first year boards. We always go back to their training. One key reminder is to expect all players to play as a team. Stay in your role. Have high expectations that the person or persons responsible with provide the proper direction.

Hypothetical #2

We always go back to the training. This hypothetical shows that the board lacks understanding of the issue and may simply not be prepared for issues that would be expected of an established school and school board. Reminding them of the training:

Self Assess – Before the treatment, there must be a diagnosis.

Define the Challenge – It is important because....

Create a Culture of Change – Understanding that change can be stressful; acknowledging that change, while needed, is difficult is important. Proper training eases the stress associated with solving the challenge while helping promote change.

Maintain the Focus – difficult issues can often times be put to the side, not dealt with, avoided or delayed. The governance leadership team must be prepared to have frank discussions that will help in making good and necessary decisions.

Develop Shared Ownership – help others accept that change will be required to resolve the issue.

Take Action – to take action you must first decide the course of action, implement your response, and monitor within your roles the effectiveness of your decisions.

Hypothetical #3

High turnover rates can be attributable to board members not understanding their responsibilities. Again, going back to the training, our training shares three well-known leaders in boards and board responsibilities.

Five Main Responsibilities:

1. Ensuring collaborative goal setting
2. Establishing non-negotiable goals for achievement
3. Creating board alignment with and support of district goals
4. Monitoring achievement and instructional goals
5. Allocation of resources to support the goals of achievement and instruction

*Source: Marzano, "District Leadership That Works"

Three Primary Responsibilities:

1. Linkage to the ownership
2. Explicit governing policies; and
3. Assurance of satisfactory organizational performance

*Source: John Carver, PhD., "Boards That Make a Difference"

Seven Primary Responsibilities of School Boards:

1. Establish core beliefs
2. Create the vision, set the goals
3. Formulate a theory of action for change
4. Direct and participate in the development of policies
5. Approve policies, allocate resources, oversee policy implementation and effectiveness of management
6. Mediate between the district and the public; and
7. Look far into the future

*Source: McAdams, former member of Houston Independence School District

Additionally, we stress the need to listen and learn.