SAGE
Business & Education

Sage helps organizations move from planning to implementation with deliverables, practical tools, and measurable progress. This List of Services summarizes areas of support to help you identify where you need help most. Use it to identify the areas where you need help, then we will tailor the scope, timeline, and level of support to fit your goals, capacity, and compliance requirements.

List of Sage Services

Sage Business & Education supports California education and community organizations through practical professional learning that strengthens leadership and staff practice. We provide training across planning, data use, workforce partnerships, grants, technology, and instruction. Sage is a Certified SB (Micro) Business with the State of California.

1. Strategic Planning

Strategic planning, project planning, and facilitation that help organizations set priorities and move work forward clearly.

- ☐ **Strategic Planning**
  - Developing clear plans, setting priorities, and mapping out how the work will move forward over time.
- ☐ **Plan Tracking Tools**
  - Creating tools and structures for tracking timelines, tasks, ownership, and progress so plans stay active and organized.
- ☐ **Annual and Three-Year Planning**
  - Developing CAEP Annual Plans and Three-Year Plans, including planning, writing, and NOVA-related workflows.
- ☐ **Retreat Planning and Facilitation**
  - Designing and facilitating retreats that help teams plan, align, and make progress on key priorities.
- ☐ **Project Management Support**
  - Coordinating complex projects across sites or partners to keep work organized, on schedule, and moving.
- ☐ **Equitable Master Scheduling with AI**
  - Using AI to build schedules that better balance program needs, student access, and equity.

2. Governance and Operations

Structures, processes, and coordination that strengthen decision-making, leadership alignment, and day-to-day operations.

- ☐ **Governance Documents, Handbooks, and Procedures (Bylaws, MOUs, etc.)**
  - Creating and organizing bylaws, MOUs, handbooks, role definitions, decision rules, and internal procedures so expectations and workflows are clear and consistent.
- ☐ **Board and Leadership Alignment Support**
  - Improving board engagement, meeting effectiveness, shared norms, and alignment on roles, expectations, and ways of working together.
- ☐ **Leadership and Organizational Transition Support**
  - Guiding organizations through periods of growth, restructuring, leadership change, or other organizational transitions.

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2. Governance and Operations (cont.)

- ☐ **New Administrator Support**
  - Support for new administrators in setting first-year priorities, focusing goals, and building a practical plan for success.
- ☐ **Staff Culture and Climate Improvement**
  - Support for improving staff morale, strengthening collegial relationships, and building a healthier schoolwide culture and climate.
- ☐ **Underperforming Staff and Department Improvement**
  - Support for addressing underperformance through clearer expectations, coaching, work coordination, and practical improvement planning.
- ☐ **Administrative, Meeting, and Project Coordination**
  - Coordinating calendars, materials, agendas, meeting preparation, leadership tasks, timelines, deliverables, and follow-through.
- ☐ **Internal Communications Support**
  - Support for clear internal messaging, updates, and communication workflows across teams.
- ☐ **Consortium Management Support**
  - Support for organizing consortium structures, routines, roles, deliverables, and follow-through.
- ☐ **Consortium Governance and Compliance Review**
  - Reviewing governance and compliance practices to identify strengths, risks, and practical improvements.

3. Programs, Pathways, and Instructional Models

Design and improvement of programs, pathways, and instructional models that better support learners and workforce goals.

- ☐ **Program and Pathway Design**
  - Designing or improving programs and pathways across ABE, ASE, ESL, and career education.
- ☐ **CTE Program Development and Improvement**
  - Designing, strengthening, and improving career education programs so they align with workforce and postsecondary goals.
- ☐ **IET and IELCE Design and Implementation**
  - Designing, strengthening, and implementing IET and IELCE models aligned to learner and workforce needs.
- ☐ **Co-Teaching Design and Coaching**
  - Building co-teaching models and coaching staff on planning, classroom practice, and inclusion strategies.
- ☐ **School Improvement Support**
  - Support for reviewing current systems, identifying what needs to change, and guiding

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improvement efforts over time.

3. Programs, Pathways, and Instructional Models (cont.)

- ☐ **Pre-Apprenticeship Program Development**
  - Designing, developing, and launching pre-apprenticeship programs, including structure, supports, worksite alignment, and, where applicable, state requirements.
- ☐ **Program Review and Prioritization**
  - Reviewing programs based on demand, cost, outcomes, and equity to guide where to focus.
- ☐ **Curriculum Alignment and Implementation**
  - Aligning curriculum, strengthening instructional coherence, and helping teams put changes into practice.
- ☐ **Gamified Learning Design**
  - Designing learning experiences that use game-based strategies to increase engagement, motivation, and growth.

4. Data, Accountability, and Reporting

Data, reporting, evaluation, and compliance work that helps organizations make informed decisions and meet requirements.

Compliance and Accreditation:

- ☐ **Adult Education Data and Accountability Support**
  - Managing CAEP and adult education reporting, TE, key metrics, timelines, and accountability requirements.
- ☐ **Federal Program Review Preparation**
  - Guidance and leadership for preparing for Federal Program Reviews, including organizing evidence, aligning documentation, and helping staff translate existing work and data into required materials.
- ☐ **Accreditation and Compliance Review**
  - Reviewing reports, documentation, and evidence to strengthen readiness for WIOA, COE, and other compliance or monitoring requirements
- ☐ **WASC Readiness Review**
  - Reviewing reports, documentation, and evidence to strengthen readiness for WIOA, COE, and other compliance or monitoring requirements.
- ☐ **WASC Accreditation Coordination and Facilitation**
  - Coordinating the accreditation process, including project management, evidence collection, self-study development, visit preparation, and follow-up planning.
- ☐ **CASAS Testing Systems and Quarterly Testing Processes**
  - Building effective and efficient structures, timelines, and staff processes for CASAS quarterly testing.
- ☐ **CLNA and CIP Support**
  - Coordination, planning, evidence collection, facilitation, documentation, and submission readiness for CLNA and CIP requirements.

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4. Data, Accountability, and Reporting (cont.)

Data Infrastructure and Reporting

- ☐ **Data Handbook Development**
  - Creating a clear reference guide for data definitions, key metrics, sources, and reporting routines.
- ☐ **Dashboards, Scorecards, and Board Briefs**
  - Creating dashboards, scorecards, and short data summaries that make information easier to understand and use.

Feedback, Evaluation, and Improvement

- ☐ **Surveys, Focus Groups, and Feedback Tools**
  - Designing surveys, focus groups, and other feedback tools, then analyzing and summarizing what was learned clearly.
- ☐ **Action Planning from Feedback**
  - Facilitated support to turn feedback and findings into clear next steps, timelines, and responsibilities.
- ☐ **Data Routines for Leaders and Teams**
  - Setting up practical routines, meeting structures, and decision-making processes for using data well.
- ☐ **Program Evaluation and Improvement Planning**
  - Measuring progress over time, reviewing results, and identifying practical steps for continuous improvement.
- ☐ **Data-Informed Improvement with AI**
  - Using AI to analyze data, spot patterns, and turn findings into clearer decisions and program improvements.

5. Workforce Partnerships and Labor Market Alignment

Partnership development with employers, community organizations, and workforce partners to strengthen alignment and opportunity.

- ☐ **Using Labor Market Data for Program Planning**
  - Support for using labor market data and information to guide program planning and workforce alignment
- ☐ **Community Asset Mapping**
  - Mapping education, employer, and community resources, services, and referral pathways in a region or community.
- ☐ **Strategic Partnership Development**
  - Building and managing partnerships among schools, colleges, employers, and community organizations, with clear roles, accountability, and follow-through.

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5. Workforce Partnerships and Labor Market Alignment (cont.)

- ☐ **Employer Advisory Group Support**
  - Support for setting up and facilitating employer advisory groups that give useful feedback, strengthen program relevance, and build stronger connections with employers.
- ☐ **Employer and Industry Roundtables**
  - Planning and facilitation for employer roundtables and other structured conversations that gather input from business and industry partners.
- ☐ **Career Exploration and Work-Based Learning**
  - Planning career exploration activities and work-based learning experiences that reflect workforce needs and local opportunities.
- ☐ **State-Registered Pre-Apprenticeship Development**
  - Developing state-registered pre-apprenticeship programs, including partner engagement, program design, DAS alignment, required documentation, and launch planning.

6. Student Success

Strategies, systems, and supports that improve access, onboarding, persistence, advising, and student outcomes.

- ☐ **Registration, Enrollment, Onboarding, and Persistence**
  - Improving enrollment, orientation, and onboarding processes, analyzing barriers to persistence, and identifying practical strategies to improve access, participation, and follow-through.
- ☐ **Recruitment and Re-Engagement Support**
  - Planning outreach, recruitment, and re-engagement efforts that help programs connect with new and returning students.
- ☐ **Student Advising System Design**
  - Designing advising systems that strengthen college and career guidance and help students navigate next steps.
- ☐ **Postsecondary Transition Support**
  - Helping students transition into college, training, and careers through planning, guidance, and access to key information and resources.
- ☐ **Mentoring Program Development**
  - Designing and strengthening mentoring programs, including structure, matching, training, tools, and support resources.
- ☐ **Culturally Responsive Student Supports**
  - Development of materials and supports that reflect student backgrounds and strengthen access, belonging, and persistence.

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6. Student Success (cont.)

- ☐ **Restorative Practices Support**
  - Planning, training for, and integrating restorative practices into daily practice..

7. Digital Systems and Technology

Digital tools, platforms, and workflows that improve communication, instruction, data management, and operational efficiency

- ☐ **Website Development and Management**
  - Planning, building, launching, updating, and managing websites that support education initiatives, programs, and outreach.
- ☐ **Customer Relationship Management (CRM), Learning Management System (LMS), and Data System Planning and Setup**
  - Selecting and setting up CRM, LMS, and data systems based on organizational needs and workflows.
- ☐ **Customer Relationship Management (CRM), Database, and Data Management**
  - Managing system setup, cleanup, migrations, data entry, quality checks, and reporting tasks.
- ☐ **Canvas Course Design and Workflow Development**
  - Designing Canvas courses, building instructional workflows, and strengthening day-to-day use by staff and programs.
- ☐ **ASAP and Canvas Setup and Coordination**
  - Setting up and coordinating ASAP and Canvas workflows, forms, and processes to improve communication, student support, and day-to-day operations.
- ☐ **Digital Credential Planning and Implementation**
  - Development and implementation of digital credentials and related systems to support student recognition and program goals.
- ☐ **Reporting and Attendance Automation**
  - Development of workflows that improve reporting, attendance tracking, and routine data processes.
- ☐ **AI Literacy, Use Cases, and Guardrails**
  - Identifying practical AI use cases, setting guardrails, and building staff understanding of responsible use.
- ☐ **AI Automations and Chat Development**
  - Design and development of AI automations and chat tools for internal use or student-facing support.

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8. Grants, Budget, and Resource Development

Grant development, budget planning, and funding systems that help organizations secure resources and manage them effectively.

- ☐ **Grant Strategy and Planning**
  - Identifying funding opportunities, setting priorities, aligning proposals to goals, and building a practical grants plan.
- ☐ **Grant Writing and Submission Coordination**
  - Coordinating grant proposals and applications, including strategy, narratives, budgets, attachments, timelines, and final submission materials.
- ☐ **Budget Review and Alignment**
  - Review of budgets, allowability, cost alignment, and audit readiness to strengthen clarity and compliance.
- ☐ **Grant Management Systems and Workflows**
  - Development of post-award systems, templates, process documents, and reporting workflows to manage grants more effectively.
- ☐ **Spending and Compliance Review**
  - Review of spending, contracts, tools, and documentation to identify issues, strengthen compliance, and reduce risk.
- ☐ **Funder Reports and Funding Summaries**
  - Development of clear reports for funders and concise funding summaries for leadership or boards.
- ☐ **Budget Allocation and Funding Coordination**
  - Coordinating budget planning, documentation, tracking, and communication related to funding and allocation decisions.
- ☐ **CAEP Budget Crosswalk Development**
  - Developing a clear crosswalk that links CAEP funds to activities, outcomes, and key metrics.

9. Communications and Marketing

Messaging, outreach, and promotional tools that help organizations communicate clearly and increase visibility and engagement.

- ☐ **Communications Strategy and Messaging**
  - Developing clear messaging and communication strategies for initiatives, programs, and organizational growth.
- ☐ **Impact Reports and Visual Summaries**
  - Creating impact reports, visual summaries, and one-page documents that combine key data with a clear narrative.

9. Communications and Marketing (cont.)

- ☐ **Marketing Strategy and Promotion Planning**
  - Development of marketing strategies and promotion plans to support recruitment, engagement, and program visibility.
- ☐ **Outreach and Engagement Planning**
  - Planning outreach and engagement efforts, including follow-up workflows, contact tracking, and communication steps.
- ☐ **Marketing Collateral Development**
  - Creating one-pagers, flyers, recruitment materials, toolkits, and other communication pieces for outreach and promotion.
- ☐ **Social Media Planning and Coordination**
  - Planning and coordination of social media content, calendars, and internal workflows to support consistent communication.
- ☐ **Conference and Event Planning**
  - Planning and coordination of conferences and events, including agendas, logistics, speakers, technology needs, and communications.
- ☐ **Content Development and Storytelling**
  - Developing newsletters, blogs, white papers, webinars, case studies, scripts, videos, and other mission-aligned content for outreach and engagement.
- ☐ **Public Relations and Media Messaging**
  - Developing press releases, media messaging, and public-facing communications that strengthen visibility, credibility, and community awareness.

10. Professional Development

Training, coaching, and learning experiences that build staff capacity, strengthen leadership, and improve practice.

For the complete list, please review: Sage List of All PD