

SEZP is kicking off the annual school planning process. This overview outlines the main features of how the process will work this year, including: 1) planning documents, 2) timeline, 3) planning support, and 4) decisions and participants.

### 1. [Planning Documents](#)

There are five main components that schools are responsible for submitting during the planning process. For each of these components, the SEZP team has created a template along with a guidance page that describes the component and suggested steps to complete it.

#### Overview of Phase I Documents

**1. School Priorities: Draft Due February 27**

A focused set of school priorities are outlined in a one or two-page document using the template provided by SEZP. Priorities should drive decision-making throughout the school planning process, including developing the school calendar, establishing a school's master schedule, setting educator working conditions, and identifying the highest-leverage instructional partners and supports for the school.

**2. Educator Working Conditions: Draft Due February 27**

The annual School Operational Plan (moving forward: "Educator Working Conditions") is a short document that outlines certain teacher working conditions in the school according to the SEA-SEZP collective bargaining agreement. This document enables each school to inform current and prospective teachers of employment expectations for the following school year.

**Note:** Beginning this year, principals must specify an amount in the first element of the Educator Working Conditions document called "Allocation of Discretionary Funds made Available by the Principal" to make available for joint decision-making with the TLT.

**3. Student & Staff Calendars: Draft Due February 27**

Student and staff calendar templates are created in an online Excel tool, and include school start and end times, days off for students, and professional development days. The calendars must reflect agreements made in the Educator Working Conditions. SEZP will use this information to create the individual school calendars posted online and to schedule transportation for each school.

#### Overview of Phase II Documents

**4. Budget & Staffing Plan: Initial Draft Due March 15; Final Draft due March 27**

Principals are required to produce a balanced budget and staffing plan in an online budget tool. Principals will record salary and non-salary budget items, including SPS and third-party services, and develop a balanced budget for next school year.

**5. Strategic Action Plan: Draft Due May 1**

The Strategic Action Plan is a short document that outlines the action steps needed to bring the school's priorities to life and should focus primarily on outlining tasks that are required to successfully launch the school year (i.e. tasks from this spring through early fall). It is also a vehicle for principals to distribute leadership to various teams in the school, and make the school's work transparent and inclusive.

## 2. [Timeline](#)

The timeline for this year’s process is as follows. Please note that principals and Teacher Leadership Teams may begin meeting with each other and/or with the larger faculty group to kick off school planning at any time.

<b>DRAFT Dates</b>	<b>Deliverable/Task</b>
<b>Late January</b>	Phase I planning documents released, including guidance and templates for: <ol style="list-style-type: none"> <li>1. School Priorities</li> <li>2. Educator Working Conditions (School Operational Plan)</li> <li>3. Student and Staff Calendar (pending release of tentative SPS SY18-19 Calendar)</li> </ol>
<b>Late February</b>	Phase II planning documents released, including guidance and templates for: <ol style="list-style-type: none"> <li>1. Budget and Staffing Plan</li> <li>2. Strategic Action Plan</li> </ol>
<b>February 27</b>	Phase I DRAFT documents due in Google Drive (Priorities, Educator Working Conditions, Calendars)
<b>March 1</b>	SPS optional service selections due in online tool
<b>March 6</b>	SEZP deadline to provide feedback to principals on Phase I documents
<b>March 14</b>	Phase I documents posted on website as “final draft pending Board approval,” prior to the SPS transfer window
<b>March 15</b>	Initial DRAFT budgets due in online tool for discussion in following week budget & ops meetings
<b>March 27</b>	Final draft budgets due in online tool
<b>May 1</b>	Strategic Action Plan due via Google Drive

## 3. [School Planning Support for Principals](#)

**Principals will receive each template, along with other supporting materials, in a personalized Google Drive folder.** Tina Harbour from the SEZP Team will update you as new templates are made available in Drive, and will support you with any questions about how to access and fill out the forms, due dates, and approvals.

The majority of ongoing support during the planning process will take place during already scheduled bi-weekly principal check-ins with Tina Harbour and Nicole Christoforo from the SEZP Team. Beginning in January, these check-ins will include time to discuss school planning related topics to ensure documents are finalized appropriately and on time. These regular check-ins should address the bulk of principals’ operations-focused planning needs and questions. This includes questions about all five of the planning components, with particular focus on the Educator Working Conditions, School Calendar, and Budget & Staffing Plan. Principals should seek support from Colleen Beaudoin and Kelley Gangi with School Priorities and the Strategic Implementation Plan, components which are more focused on teaching and learning improvement strategies.

#### 4. Decisions and Participants



#### Phase I: 1) School Priorities, 2) Educator Working Conditions, and 3) Student & Staff Calendar

WHAT: Deliverable/Task	WHO: Decisions & Participants	WHEN: Due Dates
<p>1. School Priorities 2. Educator Working Conditions 3. Student &amp; Staff Calendar</p> <p><b>When can you start?</b></p> <ul style="list-style-type: none"> <li>➤ Templates will be released starting in late January to Google Drive</li> <li>➤ Calendar tool will be released when SPS calendar is finalized</li> </ul>	<ul style="list-style-type: none"> <li>✓ <u>Faculty at large should have an opportunity to review current year Phase I documents and provide feedback</u> on what’s working, what’s not, and suggestions for improvement</li> <li>✓ <u>Principal &amp; majority of TLT must agree on all elements of these three documents</u>, or the decision goes to SEZP Board</li> <li>✓ <u>Faculty at large must review a final draft and have an opportunity to provide (meaningful) feedback</u> before documents are finalized</li> <li>✓ If SEZP provides feedback after draft documents are finalized that requires a change, the Principal and majority of TLT must re-vote and faculty must be updated on the changes and have an opportunity to provide feedback</li> </ul>	<ul style="list-style-type: none"> <li>✓ Documents must be approved at the school level and submitted to SEZP by <b>Tuesday, Feb. 27</b> (via upload to Google Drive folder)</li> <li>✓ Documents will be reviewed by SEZP team and shared with SEA. Feedback will be provided to Principals by <b>Tuesday, March 6</b></li> <li>✓ Principals re-submit (if needed) &amp; SEZP posts Phase I documents on website as “final draft pending Board approval” by <b>Wednesday, March 14</b>, prior to the SPS transfer window*</li> </ul>

*\* Note that if any further changes to Phase I documents are necessary after posting in mid-March (i.e. due to an oversight), Principals must notify SEZP and we will discuss how/if the change can be made with the SEA Leadership prior to responding to the principal.*

#### **Important changes to be aware of:**

- Schools are encouraged to use the “On the Right Path” Best Practice Guide when selecting school priorities as well as other relevant data from the SEZP Roadmap for Student Success, Tableau, or other sources, like information from the Insight survey
- We have added language to implement the first element of the Educator Working Conditions document called “Allocation of Discretionary Funds made Available by the Principal.” Beginning this year, principals must specify an amount (e.g., \$15K in a school with fewer than 500 students; \$35K in a school with more than 500 students) to make available for joint decision-making with the TLT. This could be in areas such as school supplies, field trips, after-school programming, or wraparound services. The rest of the budget (staffing, stipends, SPS services, partner fees, etc.) is the purview of the principal

**Phase II.A: 4) Budget & Staffing (for Principals only)**

WHAT: Deliverable/Task	WHO: Decisions & Participants	WHEN: Due Dates
<p><b>4. Budget &amp; Staffing Plan</b></p> <p><b>When can you start?</b></p> <ul style="list-style-type: none"> <li>➤ Optional services write-ups will be released by late January</li> <li>➤ Full budgets (including optional service pricing) will be released by mid-February</li> </ul>	<ul style="list-style-type: none"> <li>✓ Principals are responsible for submitting optional service selections and a balanced budget &amp; staffing plan to SEZP</li> <li>✓ Principals must ensure the budget and staffing plan aligns with the school priorities and working conditions</li> <li>✓ Principals must <u>communicate decisions about structural stipends (Critical Needs, Department Chair, and extra ELT) to all faculty prior to the transfer window</u></li> <li>✓ There is no TLT or faculty vote on the budget or staffing plan (including no votes on stipends)</li> </ul>	<ul style="list-style-type: none"> <li>✓ SPS optional service selections are due by <b>Thursday, March 1</b></li> <li>✓ Initial budgets are due to SEZP <b>Thursday, March 15</b> for discussion in following week's talent/ops check-in's</li> <li>✓ Final draft budgets are due to SEZP <b>Tuesday, March 27</b> (Budgets must be balanced for MUNIS load and reporting to SEZP Board)</li> <li>✓ Principals can continue making updates through June and changes will be reconciled in August</li> </ul>

**Important changes to be aware of:**

- We are not holding department presentations this year for SPS Optional Services. Departments have created expanded write-up's to continue to clarify the services they provide. Principals can reach out to Julie Swerdlow Albino & Alex Mascaro for any additional clarifications needed throughout the process and we can set up time with specific departments as needed individually or as a group
- We will be using a new online tool for the budget process this year. We will train principals on this tool when budgets are rolled out in February and be on hand to support throughout the process

**Phase II.B: 5) Strategic Action Plan**

WHAT: Deliverable/Task	WHO: Decisions & Participants	WHEN: Due Dates
<p><b>5. Strategic Action Plan</b></p> <p><b>When can you start?</b></p> <ul style="list-style-type: none"> <li>➤ Strategic Action Plan templates will be released in the coming month in Google Drive</li> </ul>	<ul style="list-style-type: none"> <li>✓ The Strategic Action Plan is a vehicle for principals to distribute leadership to various teams in the school, and make the school’s work transparent and inclusive</li> <li>✓ The principal is responsible for distributing leadership over the tasks, and is the compiler and synthesizer of the final product</li> <li>✓ The TLT and faculty participates in outlining tasks in their areas of expertise</li> <li>✓ Teams are encouraged to use the “On the Right Path” Best Practice Guide for research-based change ideas when generating action steps</li> <li>✓ The full faculty has an opportunity to review and provide feedback before the Strategic Action Plan is submitted</li> <li>✓ There is no required TLT or faculty vote on the Strategic Action Plan</li> </ul> <p><i>Note: In parallel with the Strategic Action Plan, we encourage school teams to document the roles and responsibilities of various teams in the school</i></p>	<ul style="list-style-type: none"> <li>✓ Final Strategic Action Plans are due to SEZP by <b>Monday, May 1</b> (for board review and approval) via Google Drive</li> <li>✓ SEZP will schedule an opportunity for principal discussion of plans (for sharing of ideas and practices) in April</li> </ul>

**Important changes to be aware of:**

- We encourage teams to focus primarily on outlining tasks that are required to successfully launch the school year (i.e. tasks from this spring through early fall). TLTs can then revisit and update their Strategic Action Plans in the fall to outline further tasks for the remainder of the year

**Master Schedule: Does not need to be turned in, but a few required process points**

A school’s master schedule defines which teachers meet with which students, for how long, and about what topics. The priorities it represents, whether explicit or implicit, are a critical aspect of shaping how learning takes place in the school and how educators will collaborate. Building the school schedule is a complex process that ultimately is about considering trade-offs, understanding staffing implications, and selecting options that are the best fit.

WHAT: Task	WHO: Decisions & Participants	WHEN: Due Dates
<p>Master Schedule</p> <p><b>When can you start?</b></p> <p>➤ Anytime</p>	<ul style="list-style-type: none"> <li>✓ Before the end of the school year, principals must:               <ol style="list-style-type: none"> <li>1. <u>Seek feedback from faculty</u> on prior year schedule as an input into the upcoming year’s schedule</li> <li>2. <u>Notify faculty of any major scheduling design changes</u> (e.g. moving to or away from a block schedule, rotating schedule, etc.)</li> </ol> </li> <li>✓ Principals must be sure their final master schedule reflects the Educator Working Conditions and Student/Staff Calendar voted on in Phase I</li> <li>✓ There is no TLT or faculty vote on the master schedule</li> </ul>	<ul style="list-style-type: none"> <li>✓ Principals <i>do not</i> need to submit Master Schedules to the SEZP. However, please consult Article 27 in the SEA-SEZP CBA (see below)*</li> </ul>

*\*Article 27: Teacher Assignments: Teachers may express, in writing, to the principal their preferences of grade level, subject, department assignment. Programming preferences will be given consideration in preparing the organizational chart for the following year. In order to preserve the proper educational climate, each school’s principal shall make every attempt to notify teachers of the following matters concerning their programs for next school year at as early a date as possible (if assignments change after the start of summer, teachers will receive notification via mail or e-mail): subjects to be taught, grades of the subjects to be taught; any academically talented, accelerated, honors, seminars, or special groupings which a teacher may be required to teach; number of periods; room assignments; any other pertinent information*