

Planning Process

Overview

The Bellevue School District will establish an ongoing short-term and long-term planning process by which it translates its mission, vision, values, and commitments to equity and accountability into actionable and measurable goals, strategies, initiatives, and programs. All plans will prioritize the needs of and positive outcomes for all students. Plans will provide direction for both long- and short-term decision-making by the Board of Directors and the Superintendent to fulfill the mission of the District and to make choices among competing demands for capital investment, facilities, human resources, financial resources, and other resources.

The Superintendent will develop plans for short- and long-term planning that focus on achieving strong student outcomes for each and every student. Targeted outcomes should accurately reflect and drive the core work of the District. Associated strategies and investments in goals should be identifiable so that the board and district can better understand the connections to outcomes. Long term plans should cover not only strategic direction but also long term operational and program planning and investment strategies. Annual plans should include clear district-wide goals as well as program, department, and school specific goals. Where possible, annual plan goals should be in service of advancing long-term/strategic plan goals. On occasion, some annual plan goals will be needed to address a particular issue or to fill a gap so that may be necessary though somewhat removed from strategic goals; these goals should still be included in the relevant annual plan. Regular progress monitoring and reporting must be conducted for the goals identified in all plans (see Policy 0300).

Once set, plans are generally expected to be stable for the duration specified. However, long-term plans should be evaluated annually with respect to progress monitoring, contextual factors, up-to-date research, and other relevant information to ensure they are yielding positive results for each and every student and are both feasible and scalable for staff and budget. The Superintendent, in consultation annually with the Board, should determine if any changes are needed. When proposed changes cause significant resets to particular goals or to the plan as a whole, the Superintendent will ensure appropriate stakeholder engagement and critical criteria reviews are conducted. Short-term plan goals are not anticipated to change for the timeframe covered, however, should the need arise to adjust them, the Superintendent shall consult with the Board. In the event of a significant extended disruption to schooling overall, or to particular programs, the Superintendent shall evaluate circumstances and consult with the Board to propose any critical changes to short- and/or long-term plans.

To ensure that they truly serve each and every student and reflect our district values and commitment to equity and accountability, all plans should be developed with relevant stakeholder engagement and should include critical criteria reviews (Policy 0130 and Procedure 0130P). When critical criteria reviews identify particular risks to specific groups of students, goals should include risk monitoring metrics and risk mitigation strategies associated with those goals. All plans should be shared with, readily discoverable by, and accessible to staff, students, families, community partners, and the Board.

The following details provide additional specific policy guidelines for district planning.

Long-term Plans

Longer-term plans will generally include those plans that require more than one year of work to carry out and that encompass more than one school year of time.

Strategic Plan (sometimes referred to as the 3-5 year plan)

The Superintendent will create and maintain a strategic plan that sets overall district direction and goals for a 3-to-5-year period. This plan will include:

- a focused set of outcome-based goals (referred to as strategic goals) that will be used to prioritize decision-making and activities throughout the district
- outcome-based measures (if the goal itself is not a measure) and targets that will be used to assess accomplishment of and progress towards each strategic goal (Measures may be quantitative or qualitative, but must be systematic, representative, defensible, and not primarily anecdotal.)
- a single page up-to-date summary of the goals/plan (may or may not include annual status updates for past years and/or road-map for future years)
- detailed critical assumptions upon which the plan is based
- an explanation of how the chosen strategic goals help advance the district's commitments to equity (per policy 0130 and procedure 0130P on Equity and Accountability)
- a summary of community engagement strategies employed and stakeholders who participated in the construction of the plan
- risk mitigations and monitoring criteria for potential issues identified in the critical criteria review (per policy 0130 and procedure 0130P)
- a running summary, organized by date of approval, of updates made to the plan (This summary should be kept at the end of the plan.)
- an up-to-date summary of any other long-term plans guiding the work of the district during any portion of time covered by the strategic plan

The Board must approve this plan prior to its adoption, once for each school year it is in effect, and any time a significant change is made.

The Superintendent will provide annual progress reports each year as directed bysee Policy 0300 (Reporting & Monitoring). While the strategic plan is generally expected to be stable and not to change significantly each year (until the three-to-five year cycle is complete), the Superintendent must use the monitoring data and other key information to propose any recommended adjustments to update the plan annually no later than February each year. In the case where significant changes to the plan are needed, the Superintendent will inform and consult with the Board, will engage relevant stakeholders, and must conduct a critical criteria review (see 0130 and 0130P). The Board must vote at least once per year on proposed changes to the plan no later than April of each school year. An updated strategic plan document including all of the above elements must be maintained at all times and must be readily accessible to all stakeholders, including via the district website.

Other Longer Term Plans

At certain times, the Board, in consultation with the Superintendent, will determine if the need exists to engage in planning processes with longer time horizons, such as seven, ten or twenty years. Reasons for longer term plans might include organizational direction, major capital investments, master facility plans, program commitments, or organization structure. The resulting long-term plans may create an overarching context for ongoing annual and strategic planning.

Such longer-term plans will be created and updated by the Superintendent, and subject to the same Board approval, updating, goal articulation, performance reporting and analysis, and communications as for strategic plans. While the initial construction of such plans may not follow the schedule of the strategic planning process, unless otherwise arranged with the Board, yearly monitoring and reporting, and annual plan update proposals and approvals for these other long-term plans should be conducted on the same timeline as the strategic plan.

Shorter-term Plans

Shorter term plans will generally include all annual plans and any other plans that focus on work to implement within one school year or less.

Annual Plan

The Superintendent will create a one-year plan to detail specific work across the district for the following year. This annual plan must include:

- specific one-year outcome-based goals (referred to as Tier 1 goals) that the district will pursue to advance each strategic goal in the strategic plan
- goals for each major program and department (referred to as Tier 2 goals)
 - The Superintendent will consult with the Board to identify the programs and departments that will be included in the annual plan Tier 2 goals. Generally, all departments and significant programs should provide Tier 2 goals.
 - When possible, Tier 2 goals should be mapped to the District's strategic goals (and may also be mapped to specific annual plan Tier 1 goals).
 - Tier 2 annual goals that do not clearly map to a strategic goal should address a known issue and/or put in place a missing component so that the associated department or program is better positioned to advance the strategic goals of the district or is more aligned with the district's mission, vision, values, and commitment to equity and accountability.
- outcome-based measures and targets that will be used to both drive the actual work and to assess the accomplishment of and progress towards each Tier 1 and Tier 2 goal
 - If an annual goal is itself an outcome-based measure, the district does not need to also provide a goal statement
 - Annual goal measures will be specific, measurable, achievable, verifiable, time specific (within the one year), and generally supportive of both the one-year specific plan and three-year to five-year plan.

- Annual goals must be able to be measured and evaluated by the end of the school year to which they apply.
- If measures are only available once in a school year, additional outcome-based indicator measures should be specified for evaluating whether the work is on track during the course of the school year. (Note that actions taken do not constitute outcome-based measures and should not be used to evaluate progress.)
- risk mitigations and monitoring criteria, by goal, for any issues identified during the critical criteria review
- summary of district strategies, including plans for monitoring fidelity of implementation
- detailed critical assumptions upon which the plan is based
- an explanation of how the annual goals help advance the district's commitments to equity (per policy 0130 and procedure 0130P)
- a summary of how stakeholder input and participation was applied in construction of the plan

Reporting and monitoring of both Tier 1 and Tier 2 goals should be conducted consistent with Policy 0300.

The Superintendent must provide a draft annual plan for the following school year to the Board no later than the end of the school year of the year preceding the year to which it applies. The plan should reflect the learnings from progress monitoring and evaluation of previous years' annual plans, the strategic plan, and previous years' equity and accountability targets. The Superintendent should update the plan in consultation with the Board. The plan must be voted on for approval by the Board no later than the final Board meeting prior to the start of the school year to which the annual plan applies. If there are mitigating circumstances that require additional time to address, there must be an approved annual plan in place no later than the end of October of the school year to which it applies.

Equity and Accountability Annual Plan

The Superintendent and Board will create an annual equity and accountability plan that includes a set of one-year goals/target measures and strategies to advance each of the commitments specified in the equity and accountability policy. These goals and target measures should be in compliance with Policy 0130, Procedure 0130P, and to the extent possible, aligned to the annual plan goals. plan to detail specific work across the district for the following year.

Reporting and monitoring of these one-year goals should be conducted consistent with Policy 0130, Procedure 0130P, and Policy 0300.

The Superintendent must provide a draft annual equity and accountability plan for the following school year to the Board no later than the end of the school year of the year preceding the year to which it applies. The plan must be voted on for approval by the Board no later than the final Board meeting prior to the start of the school year to which the annual equity and accountability plan applies. If there are mitigating circumstances require additional time to address, there must be an approved annual plan in place no later than the end of October of the school year to which it applies.

School Specific Annual Plans

The Superintendent will ensure that each school will construct a plan each year that complies with the government requirements for School Improvement Plans (SIP) as noted in Policy 02005 and includes the following elements:

- specific one-year outcome-based goals that will advance the district’s strategic and annual plan goals, including the district’s focus for that year on our commitments to equity and accountability, in individual school contexts
 - SIPs are not expected to have a goal for every one of the District’s Tier 1 and Tier 2 annual plan goals, but they are expected to include goals for all areas in which they are expected to demonstrate significant progress in that school year.
 - While SIP plans may also include 2-3 year goals, all goals must include a clear one-year goal.
- outcome-based measures and targets that will be used to both drive the actual work and to assess the accomplishment of and progress towards each school-specific goal
 - SIP goal measures will be specific, measurable, achievable, verifiable, time specific (within the one year), and generally supportive of both the one-year specific plan and three-year to five-year plan.
 - SIP one-year goals must be able to be measured and evaluated by the end of the school year to which they apply.
 - If measures for one-year goals are only available once in a school year, additional outcome-based indicator measures should be specified for evaluating whether the work is on track during the course of the school year. (Note that actions taken do not constitute outcome-based measures and should not be used to evaluate progress.)
- risk-mitigations and monitoring criteria, by goal, for any issues identified during the critical criteria review
- summary of school strategies, including plans for monitoring fidelity of implementation
- detailed critical assumptions upon which the plan is based
- an explanation of how the SIP goals help advance our district’s commitments to equity (per policy 0130 and procedure 0130P)
- a summary of how stakeholder input and participation was applied in construction of the plan

Reporting and progress monitoring of SIP goals should be conducted consistent with Policy 0300 as well as with any state or federal requirements (see Policy 2005).

Note that draft SIPs should be in place by the start of the school year and should be available in draft form upon request to the Board and community no later than the end of September of the school year to which the plans apply. The Superintendent will ensure that each school modifies its draft SIP as needed and the Superintendent must present the draft SIPs to the Board no later than the first Board meeting in November. The Superintendent should ensure that SIP modifications are made in consultation with the Board. The SIPs must be voted on for

approval by the Board no later than the second regular Board meeting in December and approved SIPs must be in place no later than January.

Reporting and monitoring of SIPs will occur as described in Policy 0300 (Reporting & Monitoring).

Detailed Plans

The Superintendent will also create more detailed plans on an as-needed basis to incorporate any federal or state mandated performance or improvement goals and other legally required plans.

These plans do not require Board approval except where required by law.

Commitment to Equity and Accountability

In support of the District's commitment to equity and accountability (Policy 0130 and Procedure 0130P), when creating and updating any plans, and especially the strategic and annual plans, the Superintendent will review the District commitments to equity and accountability (Policy 0130) and ensure that the plan is created in a way that helps advance those commitments. When possible, annual targets set for the district commitments in the equity and accountability procedure (0130P) will be clearly mapped to a specific goal or goals in the annual plan. In general, the work to address the district's commitments to equity and accountability should be incorporated into the core annual plan of the district. To ensure that the district's equity and accountability commitments are also identifiable and that their progress is intentionally monitored, these commitments will also remain, regardless of how well they are represented in the annual plan, distinctly articulated in the equity and accountability policy and procedure.

When any plan is created or modified, the Superintendent will ensure that it is accompanied by documentation of critical criteria review including concerns identified, mitigations made, and risk monitoring criteria identified and integrated into the monitoring and reporting for the plan. Documentation of the critical criteria review must be available to the Board during any plan review/approval process. Plans lacking critical criteria review documentation may not be voted on by the Board until a critical criteria review has been conducted and documentation has been furnished. Plans not requiring Board approval may not be implemented until a critical criteria review has been completed and documented.

Stretch Goals

It is expected that when constructing strategic, annual, school improvement, and programming/departmental plans, the District will occasionally set "stretch goals" that are deliberately challenging and ambitious. The Board encourages the Superintendent to be bold in thinking and to choose some goals that fully challenge and engage our District on behalf of our students. When "stretch goals" are set, they should be identified as such in their respective plans and documentation. While stretch goals will be pursued, reported on, and monitored like other goals, they will also be considered in context of their particularly challenging nature when the Board is making related decisions and determinations. "Stretch goals" should account for no more than ten to twenty percent of all goals contained in any one given plan.

Stakeholder Input

At least every five years, usually in conjunction with a major refresh to the strategic plan or the development of another long-term plan, the District will actively seek representative community input through a process that will be developed by the Superintendent with input from the Board. Based on the input gathered, the Superintendent will re-examine the strategic plan and refresh the plan or make adjustments as necessary to major initiatives and goals that have three-to-five year, or longer, time horizons.

When individual goals, measures, and monitoring plans are being established for annual or other plans, district data should be consulted to provide district-specific insights about student and other stakeholder needs and experiences. In addition, relevant stakeholders of those particularly impacted by the given goal or plan should be given an opportunity to voice related needs and concerns and/or to provide feedback on the proposal prior to it being finalized. Stakeholder input may take different forms in different cases – for example, in some cases, student, parent, or teacher focus groups may be used, while in other cases a survey or community forum may be applied, and in other cases, an advisory group or other representative stakeholders may be consulted. Such plans should recognize that no individual should be considered to represent an entire subgroup of our population and that individuals belong to multiple subgroups. The extent of stakeholder input required will vary substantially from goal to goal, and plan to plan, and clear shared expectations must be established with stakeholders about how the input will be applied in each instance.

Changes in Planning Assumptions

The Board must approve substantive changes to any strategic or annual plan goals if they are needed. The Superintendent must report to the Board, in a timely way, any change in critical assumptions or actual performance that would prompt revisions to the annual or strategic plans. Such a report must be included on the relevant Board meeting agenda for consideration by the Board.

Communications

The Superintendent will ensure that up-to-date versions of the annual plan, SIPs, strategic plan, and other long-term plans, can be easily located on District website. Additionally, the Superintendent will ensure that any department, school, or program that has a dedicated webpage will maintain an up-to-date post of its annual goal(s) and/or plan(s), or a link to view them, on their webpage. Monitoring and reporting of progress on plans will be governed by Policy 0300.

Calendar

The organization's annual fiscal and planning year is the school year (September 1 through August 31). Because longer term plans (like the strategic plan, and other long-term plans) provide direction and context for the annual planning cycle, such plans must be completed and approved earlier in the school year so that they can be effectively reflected in the fiscal and annual plans. The annual and strategic plans, and any longer-term plans, will be used to guide the financial plan and budget for the district.

Budget

The Superintendent will plan and present the budget to the community and for approval by the Board as specified in Policy 6000. Investments in key aspects of both long-term and shorter-term plans should be identifiable in the Budget. When the annual budget draft is presented to the board, a high-level summary of budget changes should be included to outline changes in investments to support implementation of the annual plan and to reflect lessons learned from evaluation of the previous school year's annual/strategic plan and equity and accountability commitment work.

Cross References:

Board Policy 0100	Mission
Board Policy 0110	Vision
Board Policy 0120	Guiding Principles
Board Policy 0140	Legally Required Goals
Procedure 0150P	Three-year to Five-Year Plan
Board Policy 0300	Reporting and Progress Monitoring
Board Policy 2005	School Improvement Plans
Board Policy 6000	Budget

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