

HANDBOOK 9: Developing Long-Term Plans for Teaching

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This handbook is one of a series published for the project Collaboration for Excellence: The North Dakota Curriculum Project.

The publication is free to public school educators in North Dakota, who may make copies without permission.

These handbooks represent a team product. A major contributor was Ann Clapper, who was previously Director of the Office of Curriculum Leadership and Improvement. Numerous educators in North Dakota reviewed all these materials and made valuable suggestions. Especially helpful were the following North Dakota educators: Janet Edlund, Dakota Prairie High School; Cheryl Kuhas, North Dakota Department of Public Instruction; Karen Nelson, Hettinger; Sandra Willprecht, Forman. Allan A. Glatthorn, Distinguished Research Professor at East Carolina University, served as consultant to the project.

It should be emphasized that the processes suggested here should be seen only as recommendations, not mandates. The authors value the ability of North Dakota educators to develop their own processes that reflect the needs and resources of their schools.

1. UNDERSTANDING THE NATURE OF LONG-TERM PLANS

The district curriculum guide is a foundation for teachers' planning. Effective principals know how to help teachers use the guide to develop long-term and unit plans. This handbook explains the nature of long-term plans, provides a rationale for their use, suggests one way of organizing for long-term planning, and then presents a process by which a faculty can collaborate in the development and review of such plans. Handbook 10 then explains how teachers can use the long-term plan as a basis for unit planning.

The Nature of Long-term Plans

Long-term plans are documents, usually in calendar form, that show the units that the teacher will teach through the course of the term or year. (Teachers on a block schedule should do term planning; those on a traditional schedule, yearly planning.) These plans:

- ! are organized systematically on a calendar that lists the weeks of the term or year;
- ! indicate significant events occurring in the school community that will affect teaching and learning;
- ! list the unit titles to be taught; and
- ! identify the benchmarks or objectives to be emphasized.

Two sample forms are shown in Display 9-1. Many elementary teachers prefer Example B. Example A provides more planning information; Example B shows how the subjects are aligned.

Rationale for Long-term Planning

For several reasons the long-term plan is a very useful document. A long-term plan:

- ! Fosters collaborative planning by a grade-level or subject team since teachers work together in producing it.
- ! Provides a foundation for the more detailed unit plans by translating the Curriculum Guide into a series of units.
- ! Facilitates coordination across subject lines by allowing for the examination of the flow of instruction in two or more related subjects.
- ! Operationalizes the school's decisions with respect to curriculum integration.
- ! Displays the sequence of units across the year.
- ! Shows the time allocations teachers have made for the several units, thus providing a useful tool for curriculum monitoring.

Display 9-1: Forms for Long-Term Plans

Example A

Team: English II Date submitted: 9/23

Weeks of Year	Important Events	Unit Title	Standards/ Benchmarks	Benchmark
1/13-17	Martin Luther King birthday	Transformational Leaders	ELA Standard 5	Write editorial
1/20-24				
1/27-31				

Example B

Team: 5th Grade Date submitted: 9/23

	1/13-17	1/20-24	1/27-31
Language Arts	Opinion Letter		
Social Studies	Great leaders		
Science	Life in winter		
Math	Factoring		

While the long-term plan has several reasons for recommending it, not all teachers are enthusiastic about developing and using long-term plans. Some see it as simply one more administrative requirement. Others complain that school life is so unpredictable that no plan can ever be an accurate portrayal of the actual teaching and learning that go on in the classroom. Given such teacher opposition, the principal needs to lay the groundwork, as explained below.

2. ORGANIZING FOR LONG-TERM PLANNING

Each school will use its own system for accomplishing the planning process. The procedures explained below have worked well with several schools.

Develop the Proposal

The first phase is to develop the school's proposal for long-term planning. The principal should introduce the concept of long-term planning during the spring semester so that decisions can be made in a timely manner. The long-term planning proposal may be developed in a faculty meeting devoted solely to this topic. The steps to take at this meeting follow.

- (1) The principal (or one of the teacher-leaders) should make a 15-minute presentation of the concept of and rationale for long-term planning.
- (2) The teachers should meet in small groups to discuss their views and their present practice with respect to long-term planning.
- (3) The teachers should report out the results of their small group discussions to the entire faculty.
- (4) The principal should determine how much support there is for long-term planning.
 - If there seems to be general support for the process, the principal can then move into the next phase.
 - If there is strong opposition, further study is needed. In this instance, the principal should take the time to explore more deeply the reasons for opposition and work with teachers to remove the obstacles that make them question the value of planning.

Once sufficient support has been developed, the principal should then ask a special task force (or one of the existing school committees) to develop a specific proposal for faculty to examine. By reviewing this handbook, analyzing the literature, visiting schools using such plans, and sharing their own experience and knowledge, the task force should make a series of recommendations about the following issues:

- ! The format for long-term planning
- ! The contents of the long-term plan
- ! The structure by which they will be produced—team, department, or individual
- ! The review process
- ! The schedule for developing long-term plans

Once the proposal has been reviewed and revised, it should be adopted and disseminated as the school's process for long-term planning. While schools will vary in how they accomplish this initial organizing task, the principal should ensure that the school's planning structure and processes have been developed with significant teacher input.

Lay the Foundations

The next phase in the process is to establish the foundations for long-term planning.

(1) Develop the forms.

- This is a crucial step, since the forms will also dictate content. One possible form (Display 9-1, Example A) includes five essential planning items: the weeks of the school year; the events that will impact on teaching and learning (national and state holidays; parent meetings; student extra-curricular activities; report card and parent conference days); the title of the unit; the standard and benchmark from which the unit has been drawn; the textbook pages that support the unit.
- The alternative form (Display 9-1, Example B) shows the four main subjects taught by elementary teachers in one column and the units indicated for each week. While it lacks some of the details of the standard form, its chief advantage is that it shows how the several subjects relate to each other.

(2) Provide the training.

- One two-hour training session for the entire faculty should be sufficient to introduce the form and review the skills needed. Follow-up sessions can be held at the team level.

(3) Establish deadlines for submission of plans.

- Recommend to teachers that in the summer they develop standard plans for the first four weeks of school. Use those four weeks to assess student readiness, determine student needs, go over class routines, and introduce the subject. Then, with this knowledge of the students and the curriculum in mind, develop a sound plan for the rest of the year.

(4) Provide blocks of planning time for teams to collaborate on the planning.

- With all these preparations made, one half-day work session should be sufficient to accomplish the planning process.

3. DEVELOPING LONG-TERM PLANS

There are several processes that teams can use in developing the long-term plan. Several teams have found the following one to be effective and efficient. (The process assumes that the team is using the form shown in Display 9-1 to plan one subject.)

Develop the Plans

(1) Complete the basic information.

- The team should note the team's name, list the weeks of the school year, and note the important events.

(2) Identify the titles of the units to be taught.

- In order to identify the unit title, which should indicate the main focus of the unit, the team should follow these steps:

1) Analyze the curriculum guide carefully.

- The team should list the benchmarks in the order in which they are presented in the guide and asterisk those benchmarks that are likely to be tested in state and district tests.

2) Determine the organizing principle to be used in grouping the benchmarks or objectives.

- The objectives have probably been listed in the guide according to some logical categorization of general goals. The objectives may be grouped by various classification systems:

- * Complex skills ("Writing the personal narrative")
- * Time periods ("The Industrial Age")
- * Themes ("Families First")
- * Problems ("Cleaning Up the Environment")
- * Major works of art ("The Book of Job")
- * Literary or artistic genres ("The Nature of Tragedy")

3) Check the texts to be used.

- Teachers who have a somewhat shallow knowledge of the subject may find the textbook organization the simplest way to identify unit titles.

4) Make a tentative list of unit titles and then refine it through discussion and assessment.

5) Note the decided-upon titles on the form.

(3) Determine the sequence of units.

- Once the tentative list of titles has been developed, the team should next decide on the order of units. Several sequencing principles are available. Units can be organized by:
 - * Students' interests, beginning with a unit that has high interest and using seasonal progression to determine placement of other units
 - * Content difficulty, starting with units that would be relatively simple and then moving to more challenging ones
 - * Time, as they often are in history courses or courses emphasizing British or American literature
 - * An "expanding horizons" approach, beginning with the individual, then the family, then the community, followed by the state and the nation
 - * The structure of that subject, as mathematics units usually are
 - * Combining two or more of the aforementioned principles

(4) Allocate time to each unit

- The time can perhaps best be represented by the number of instructional periods to be devoted to the unit; an instructional period is defined as a clearly demarcated session lasting from 30-50 minutes. To determine time allocation, the team should:
 - 1) Calculate the total number of instructional periods available.
 - 2) Determine the relative importance of each unit, according to district and school priorities.
 - 3) Consider the attention span of the students.
 - 4) Assess the complexity of the unit, keeping in mind the importance of depth.
 - 5) Tentatively allocate periods to each unit.
 - 6) Translate the periods to weeks.

(5) Record information on long-term calendar.

- All the above information should be recorded on a long-term calendar.

(6) Relate Curriculum Guide objectives to units.

- Do one final check to be sure that all the benchmark skills and knowledge have been included in the units. Perhaps the easiest way to do this is to note in which unit each benchmark is emphasized.

Review the Plans

Once the grade level or subject team have produced and evaluated their calendar, the principal should then undertake his or her own review. The first step is to review the calendars individually, using the criteria listed in Display 9-2.

Once all the individual calendars have been reviewed, the principal should then examine together all the calendars for a given grade level to see if there is appropriate correlation between such related subjects as science and mathematics and English language arts and social studies. Then the principal should examine together all the calendars for a given subject, to assess the grade-to-grade progression, ensuring that there is not undue repetition.

Display 9-2: Criteria for Evaluating Long-Term Curricular Plans

Do the curriculum plans . . .

1. Reflect and correspond with the school calendar?
 2. Note significant events likely to influence teaching and learning?
 3. Organize the benchmarks into units, with titles clearly stated?
 4. Sequence the units appropriately?
 5. Allocate time appropriately?
 6. Ensure that all benchmarks are included?
 7. Reflect the importance of depth of understanding?
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