



Academic Office Process Management System Procedures (2022 -2023)

November 7, 2022

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ACADEMIC PROCESS MANAGEMENT PROGRAM

Version Log			
Date	Version	Editor	Notes
11/02/22	1	TBullock	Initial Release
2/12/23	2	TBullock	Process Survey Template
2/12/23	3	TBullock	Process Survey Summary Results
3/2/23	4	TBullock	Contracts Management Procedure
3/2/23	4	TBullock	MOU Work Instruction
3/2/23	4	Tbullock	Preparing Vouchers Instructions

DEFINITIONS			
PMS	Process Mgt. System	CAO	Chief Academic Officer
CUR	Curriculum	PD	Professional Development
LDV	Leadership Development	SPED	Special Education
EBM	ESOL Bilingual Migrant Program		
P	Procedure	W	Work Instruction
<i>All Associated Documents listed in this document are available via SLPS Microsoft Teams / Academic Office Playbook / Process Management.</i>			

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Academic Office Process Management Program

The Curriculum Division started publishing their core processes through the 2008 Quality Assurance Systems (QAS) initiative. The purpose of the QAS initiative was to improve the quality of services provided to the District by central operations through a quality assurance system that will enhance the District's ability to consistently meet the requirements of the students, parents, community members (business community inclusive) and employees of the District.

Since 2008, The Academic Office continued to improve their Academic core processes and improve the quality of services provided to the District, students, parents, community members (business community inclusive) and employees of the District.

The Current Academic Office Process Management Program is our current tool for achieving continuous improvement by ensuring the processes in the Academic Office are described and interfaced as well as ensuring the efficiency and effectiveness of the services delivered to students, parents, community members (business community inclusive) and employees of the District.

- *All “Associated Documents” listed in this document are available via SLPS Microsoft Teams / Academic Office Playbook / Process Management.*

Quality Management System

The following is an excerpt from AMERICAN NATIONAL STANDARD; Quality management system standards – Requirements for education organizations; ASQ/ANSI Z1.11-2011

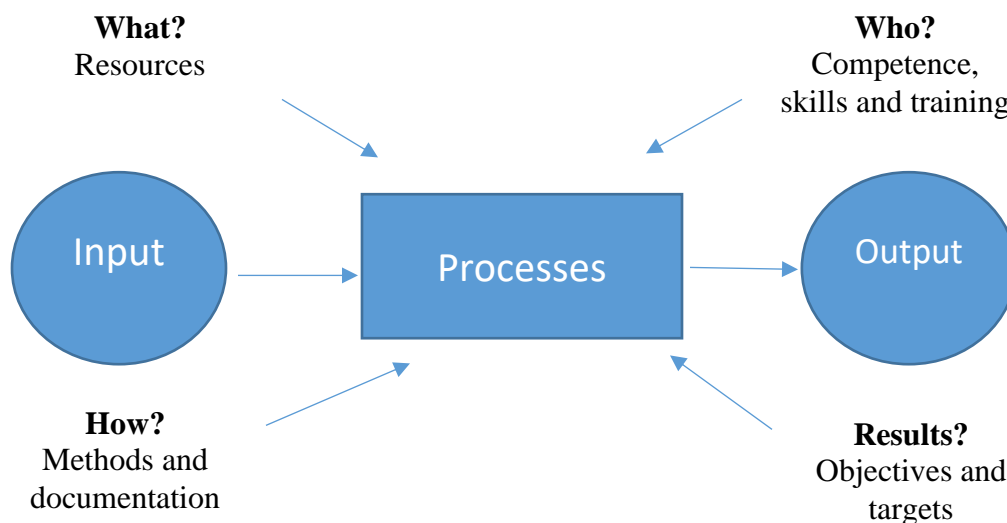
“A Quality Management System enables an education organization to assess the degree to which it fulfills its requirements, controls its resources, and stabilizes its processes. Requirements for education organizations appear in published course syllabi, curriculum, behavioral objectives, and contracts for training. In addition, education organizations must comply with regulatory requirements, laws and the requirements of Z1.11. Education organizations that meet Z1.11 requirements can expect consistent learning (at no additional cost) through the rigorous implementation of the following:

- a) strategic plans to identify strengths, weaknesses, opportunities, and threats,
- b) action plans to integrate curriculum, learning objectives, technology, teaching methods, and results,
- c) effective processes that realize planned activities and achieve planned results,
- d) instructional and administrative Plan-Do-Check-Act cycles to improve processes,
- e) analysis of performance results to identify process improvement opportunities, and
- f) processes for addressing concerns of students and other interested parties.”

It is the intent of the Academic Office to have their Process Management System Program 9001:2018 Certified in the near future.

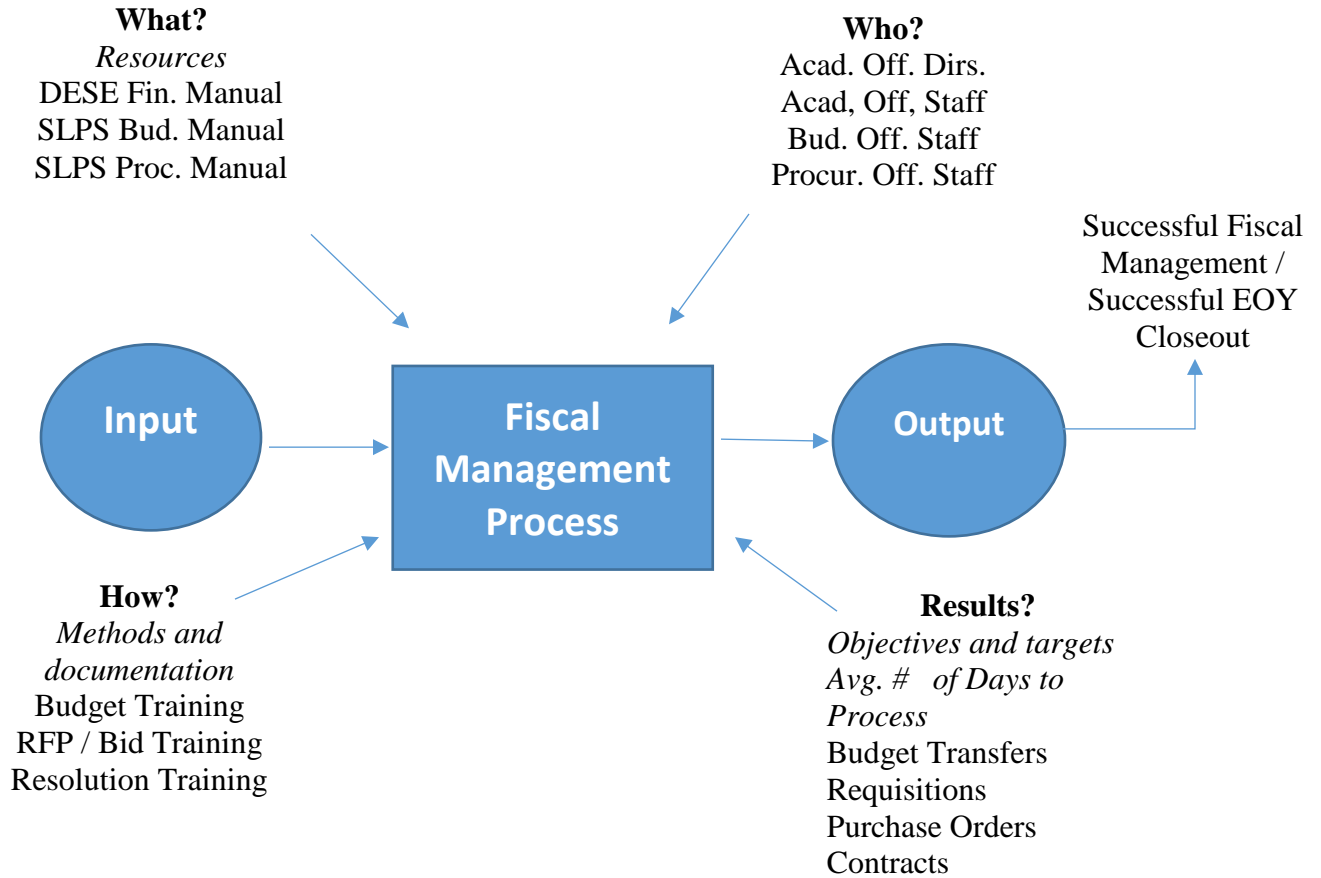
Processes, Procedures. And Work Instructions

- **PROCESS** — what needs to be done and why
- **PROCEDURE** — how the process needs to be done
- **WORK INSTRUCTION** — how to perform a task within a process (if more detail is needed than in a procedure)
- **Processes**
 - A process document defines a process in a broader sense. They do not need to contain details and they should have objectives that you should be able to measure. The documents must contain the expected inputs and outputs, the required resources, and key activities



- **Procedures**
 - How to perform a process is explained in the procedure. It usually contains elements like why the procedure is required; what and how needs to be done; who performs what action; where the inputs come from and where the outputs go; tools, information, or other resources required; terminology, definitions, etc.
- **Work Instruction**
 - A work instruction describes how to perform a task within a process (if more detail is needed than in a procedure). The detail can be specific tasks referenced in a procedure, aid in training, etc. It also can contain tasks to reduce mistakes.

Academic Office Fiscal Management Process Overview

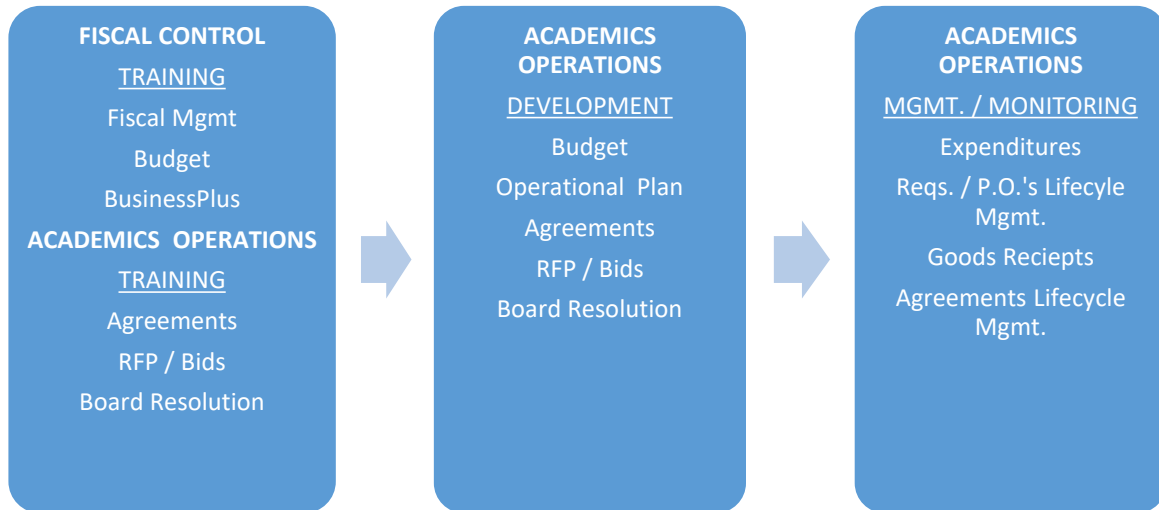


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Academic Office Fiscal Management Process Steps

Step #	Process Steps	Responsible
1	Fiscal Management Training	
	Fiscal Management Training	Budget Office Staff
	Budget Training	Budget Office Staff
	BusinessPlus Training	Budget Office Staff
	Contract / Agreement Training	Terry Bullock
	RFP / Bid Training	Terry Bullock
	Board Resolution Training	Terry Bullock
2	Fiscal Development	
	Budget Development	Terry Bullock / Acad. Off.
	Academic Operational Plan Development	Terry Bullock / Acad. Off.
	Contract / Agreement Development	Terry Bullock / Acad. Off.
	RFP / Bid Development	Terry Bullock / Acad. Off.
	Board Resolution Development	Terry Bullock / Acad. Off.
3	Management / Monitoring	
	Expenditures Management	Terry Bullock
	Requisition / Purchase Order Lifecycle Management	Terry Bullock
	Goods Receipts Processing Monitoring	Terry Bullock
	Agreements Lifecycle Management	Terry Bullock
	Board Resolution Prep. / Submittal Management	Terry Bullock
RESULTS		
	Average # of Days to Process Budget Transfers	
	Average # of Days for Reqs. / P.O. Lifecycle Management	
	Average # of Days for Agreements. Lifecycle Management	
	Successful closeout of P.O's at EOY	
	Decrease in Ratifying Board Resolutions	

Academic Office Fiscal Management Process Flow Chart



ACADEMIC PROCESS MANAGEMENT PROGRAM

2021 – 2022 Procedures / Work Instructions Review Results

PROCESS MANAGEMENT PROCEDURES AND WORK INSTRUCTIONS			
Number	Title	Reviewed by	Retain / Revise/ Delete
PMS P001	Management Review	Terry Bullock	Retain
PMS P002	Corrective Action Request	Terry Bullock	Retain
PMS P003	Document Control	Terry Bullock	Retain
PMS P004	Preventive Action	Terry Bullock	Retain
PMS P005	Customer Satisfaction	Terry Bullock	Retain
PMS P006	Quality Records	Terry Bullock	Retain
PMS P007	Internal Quality Audit	Terry Bullock	Retain
PMS P008	Control of Nonconforming Processes	Terry Bullock	Retain
PMS P009	Continuous Improvement	Terry Bullock	Retain
PMS W001	Revise / Add / Delete a Document	Terry Bullock	Retain
PMS W002	Internal Audit	Terry Bullock	Retain
PMS W003	Auditing Activity	Terry Bullock	New
CHIEF ACADEMIC OFFICER PROCEDURES AND WORK INSTRUCTIONS			
Number	Title	Reviewed by	Retain / Revise/ Delete
CAO P001	Pilot Program Approval	Derrick Mitchell	Retain
CAO P002	Knowledge of Transfer	Tony Maltbia	Retain
CAO P003	Plan / Dev. For Summer Learning	Judine Keplar	Under Review
CAO P004	Voucher Payment	Terry Bullock	Revised
CAO P005	Mileage Reimbursement	Terry Bullock	Revised
CAO P006	Athletics Game Officials Payment	Terry Bullock	Deleted
CAO P007	Athletics RFP	Terry Bullock	Deleted
CAO P008	Field Trip	Estelle Morgan	Under Review
NEW	CAO Internal Onboarding	Terry Bullock	New
NEW	Operational Plan Development	Terry Bullock	New
NEW	Academic Office Budget Development	Terry Bullock	New
NEW	Operations Monthly Report	Terry Bullock	New
NEW	Agreements Monitoring	Terry Bullock	New
NEW	Project Manager Coaching	Terry Bullock	New
NEW	Process Improvement	Terry Bullock	New
CAO W001	Preparing Vouchers Request for Payment	Terry Bullock	Revised

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CAO W002	Preparing Mileage Reimbursement	Terry Bullock	Revised
CAO W003	Preparing Athletic Vouchers	Terry Bullock	Deleted
CAO W004	Preparing Professional Learning Request	Derrick Mitchell	Retained
CAO W005	MOU Processing	Terry Bullock	Revised
NEW	Tactical Plan Development	Terry Bullock	New
NEW	Preparing Extra Service Request	Terry Bullock	New

CURRICULUM PROCEDURES

Number	Title	Reviewed by	Retain / Revise/ Delete
CUR P001	New Adoption of Instr. Materials	Judine Keplar	Deleted
CUR P002	Curriculum Development	Glen Barnes	Under Review
CUR P003	Review and Revision of Course Catalog	Esther Palsenberger	Deleted
CUR P004	New Course Addition	Judine Keplar / Zehra Khan	Under Review
CUR P005	Destiny System / Inventory	Taresa Wright - Fraser	Under Review
CUR P006	Curriculum Committee	Zehra Khan	Under Review
CUR P007	Curriculum Workgroup	Judine Keplar	Under Review
CUR P008	New Adoption Committee	Glen Barnes	Under Review
CUR P009	Textbooks Fall Inventory	Esther Palsenberger	Under Review
CUR P010	Common Formative Assessments	Taresa Wright - Fraser	Deleted
CUR P011	Focus Observations and Coaching	Zehra Khan	Deleted
CUR P012	Focus Instructional Learning Walks	Judine Keplar	Deleted

EARLY CHILDHOOD EDUCATION PROCEDURES

Number	Title	Reviewed by	Retain / Revise/ Delete
ECE P001	ECE Marketing	Samantha March	Revised
ECE P002	Withdrawal	Samantha March	Revised
ECE P003	Registration for New Students	Samantha March	Revised
ECE P004	Registration for Returning Students	Samantha March	Revised

SPECIAL EDUCATION PROCEDURES

Number	Title	Reviewed by	Retain / Revise/ Delete
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SPED P001	IEP – Agency Referral	Charmaine Moore	Retain
SPED P002	IEP – Parent Referral	Charmaine Moore	Retain
LEADERSHIP PROCEDURES			
Number	Title	Reviewed by	Retain / Revise/ Delete
LDV P001	Principal Information / Meeting Request	Current PD Staff	Currently Under Review
PROFESSIONAL DEVELOPMENT PROCEDURES AND WORK INSTRUCTIONS			
Number	Title	Reviewed by	Retain / Revise/ Delete
PDV P001	Contact Hours	Current PD Staff	Under Review
PDV W001	Calendaring Professional Development	Current PD Staff	Under Review
PDV W002	Professional Development and Calendar Report	Current PD Staff	Under Review

PROCESS MGMT CUSTOMER SATISFACTION SURVEY TEMPLATE

Name of Procedure:	
Procedure Number:	
Submitter's Name:	
<u>Questions</u>	<u>Yes / No</u>
Did you find the procedure effective?	
Feed forward comments	
Would you like us to improve the procedure?	
Feed forward comments	
Do you have all the tools and resources to carry out this procedure effectively?	
Feed forward comments	
Did this procedure add value to your work?	
Feed forward comments	
Did you receive training on this procedure?	
Feed forward comments	
Did you receive proper guidance needed for this procedure?	
Feed forward comments	
Will you consider using the procedure in future?	
Feed forward comments	
Are there concerns that will keep you from using the procedure again?	
Feed forward comments	
Is there anything you want to suggest to us in making the procedure better?	
Feed forward comments	

PROCESS MANGEMENT CUSTOMER SATISFACTION SURVEY RESULTS
February 12, 2023

SPED P001 – Initial Evaluation Process – Agency Referral

Name of Procedure: INITIAL EVALUATON PROCESS – AGENCY REFERRAL		
Procedure Number: SPED P001		
<u>Questions</u>	<u>RESPONSES</u>	
	<u>YES</u>	<u>NO</u>
Did you find the procedure effective?	10	0
Would you like us to improve the procedure?	5	3
Do you have all the tools and resources to carry out this procedure effectively?	5	5
Did this procedure add value to your work?	8	8
Did you receive training on this procedure?	7	4
Did you receive proper guidance needed for this procedure?	7	3
Will you consider using the procedure in future?	7	3
Are there concerns that will keep you from using the procedure again?	3	8
Is there anything you want to suggest to us in making the procedure better?	6	3

SPED P002 – Initial Evaluation Process – Parent Referral

Name of Procedure: INITIAL EVALUATON PROCESS – PARENT REFERRAL		
Procedure Number: SPED P002		
<u>Questions</u>	<u>RESPONSES</u>	
	<u>YES</u>	<u>NO</u>
Did you find the procedure effective?	9	0
Would you like us to improve the procedure?	5	3
Do you have all the tools and resources to carry out this procedure effectively?	4	5
Did this procedure add value to your work?	8	1
Did you receive training on this procedure?	7	3
Did you receive proper guidance needed for this procedure?	8	2
Will you consider using the procedure in future?	8	1
Are there concerns that will keep you from using the procedure again?	3	6
Is there anything you want to suggest to us in making the procedure better?	5	3

- Feed Forward Comments can found within the completed surveys Teams folder

Management Review Procedure (PMS-P001)

Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the process by which the Members of the Management Review Team within the SLPS Academic Office will conduct Management Review Team Meetings.

2.0 RESPONSIBILITY:

- 2.1 Deputy Superintendent for Academics / CAO

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

- 3.1 Management Representative

Signature

Date

4.0 DEFINITIONS:

- 4.1 CAO – Chief Academic Officer
4.2 SLPS – Saint Louis Public Schools

5.0 PROCEDURE:

- 5.1 The Management Review Team holds management Reviews a minimum of once per month and more often as deemed necessary.
- 5.2 Management Reviews ensure the Quality Management System continuing suitability, adequacy and effectiveness. The reviews include assessing opportunities for improvement and the need for changes to the Academic Office Process Management System including the Academic Office Mission, Vision, and Operating Principles.
- 5.3 The following departments, as a minimum, will provide staff to serve as members of the Management Review Team: Curriculum, Professional Development, Leadership Development, and the Special Education Office. To conduct a formal Management Review, the Process Management System Management Representative, Lead Auditor, and at least 75% of all Management Review Team members must be present.
- 5.4 The input to Management Reviews shall include information on:
- a) Results of audits that indicate process performance and conformity to requirements conducted since the previous review.
 - b) Customer feedback because of customer complaints and/or customer surveys conducted, when required.
 - c) Status of Quality Improvement Requests and Preventive Action Requests.
 - d) Follow-up actions from previous Management Reviews.
 - e) The Academic Office Vision, Mission, and Operating Principles.
 - f) Planned changes that could affect the Process Management System.
 - g) Recommendations for improvement.

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- 5.5 Review output: The output from the Management Review shall include any decisions and actions related to:
- a) Improvement of the effectiveness of the Process Management System and its processes.
 - b) Improvement of the District processes as it is related to customer requirements.
 - c) Any resource needs determined.
- 5.6 The Management Review Meeting Minutes will include the items discussed in the agenda, action items assigned, and any miscellaneous items discussed.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Management Review Agenda
- 6.2 Management Review Meeting Minutes
- 6.3 Management Review Team sign-in sheet

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Management Review Agenda, Sign-in Sheet and Meeting Minutes	Electronic Folder	3 years	Discard as desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
3/2/20		Initial Release

*** * * E n d o f p r o c e d u r e * * ***

Corrective Action Request Procedure (PMS-P002)

Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the process for obtaining customer / owner feedback to help make process improvements.

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

2.0 RESPONSIBILITY:

- 2.1 Management Review Team
2.2 Management Representative

3.0 APPROVAL AUTHORITY:

- 3.1 Management Representative

Signature

Date

4.0 DEFINITIONS:

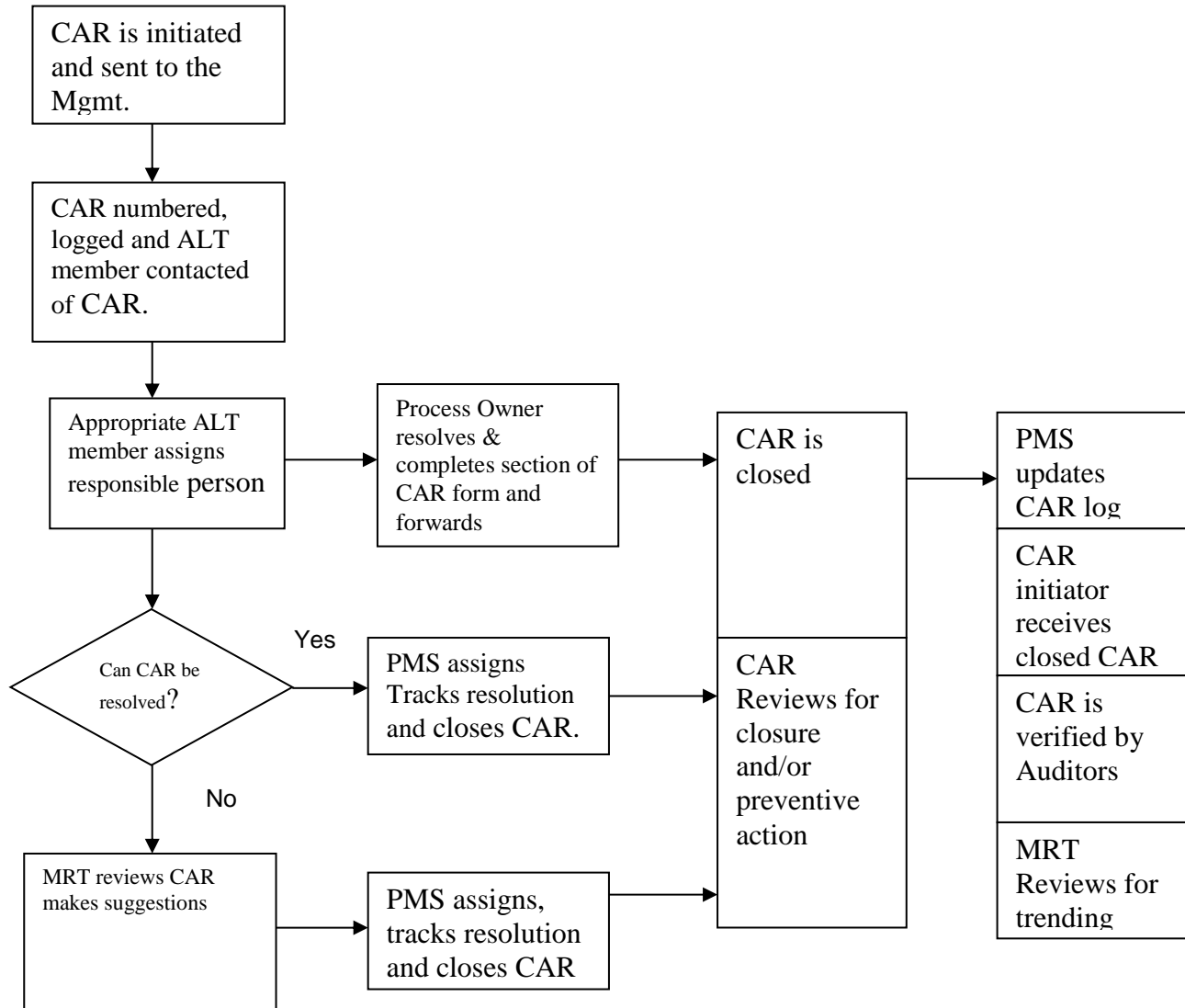
- 4.1 SLPS – Saint Louis Public Schools
4.2 Requestor – any SLPS Customer / Owner submitting a Quality Improvement Request
4.3 Process Owner(s) – the individual(s) identified as being the owner(s) of the process
4.4 ALT – Academic Leadership Team
4.5 PMS – Process Management System
4.6 CAR – Corrective Action Request
4.7 MRT – Management Review Team

5.0 PROCEDURE:

- 5.1 Any customer / owner of SLPS may identify problems. These problems may be the result of an ineffective service, discrepant material from a vendor of the school system, or any other type of concern. Concerns not appropriate to this process include personnel and contractual issues.
- a) The requestor(s) is/are encouraged to contact the appropriate department / school to resolve the concern or the requestor may file a Corrective Action Request by completing Section #1 of the form PMS-F001 and submitting it to the Management Representative.
- b) The requestor is to attach all supporting documentation, emails, lists, occurrences, etc. to the Corrective Action Request.
- 5.2 The Management Representative or designee will assign the form a control number and will enter the information into the Corrective Action Request Log.
- a) The Management Representative or designee will contact the appropriate Academic Leadership Team member to make them aware of the Corrective Action Request.
- 5.2.a.1 The Academic Leadership Team member will identify the appropriate Process Owner and will inform the Management Representative regarding assignment of that Corrective Action Request.

ACADEMIC PROCESS MANAGEMENT PROGRAM

- b) The Management Representative or designee will file a copy of the Corrective Action Request and forward the original to the office of the Process Owner.
 - c) The Management Representative will contact the requestor to inform them that the concern has been received and forwarded to the Process Owner to be addressed.
- 5.3 The Management Review Team will receive reports on all new Corrective Action Request(s) submitted to the Management Representative.
- 5.4 The Process Owner assigned to investigate the Corrective Action Request(s) will complete Section (2) of the form, identify the cause of the concern, and propose a Corrective Action Plan.
- 5.5 The Process Owner will obtain the appropriate signatures and forward the form to the Management Representative.
- 5.6 The Management Representative will receive the form from the Process Owner outlining the action plan for the improvement.
- a) The Management Review Team will receive updates on the results of the Corrective Action Request(s) at each Management Review Team meeting.
- 5.7 The Management Representative will verify that the improvement has been implemented and/or steps will be taken to ensure an acceptable outcome, including changes to document procedures, where appropriate. Section #2 of the Corrective Action Request will be completed.
- a) The Management Representative will follow up with the requestor to verify their satisfaction with how the Corrective Action Request was resolved.
 - b) If improvement to the process cannot be implemented, the Corrective Action Request is taken to the Management Review Team as part of a future agenda.
- 5.8 The Management Representative and/or support staff will date and close the original copy of the Corrective Action Request and ensure that it is properly filed. This information will be recorded in the Corrective Action Request Log.
- 5.9 The Management Review Team will review the Corrective Action Requests for trends. The Management Representative or designee will appoint a Management Review Team member to assign a work team for further preventive action, if necessary.
- 5.10 A flow chart detailing the steps of this process may be found in Exhibit A.

Exhibit A

ACADEMIC PROCESS MANAGEMENT PROGRAM

6.0 ASSOCIATED DOCUMENTS:

6.1 Corrective Action Request Form (PMS – F001)

6.2 Corrective Action Request Log (PMS – F006)

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Corrective Action Log	Electronic Folder	3 years	Discard as desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
3/2/20		Initial Release

Document Control Procedure (PMS-P003)

Academic Office

1.0 SCOPE:

- 1.1 This procedure outlines the process for adding, modifying, or deleting documents within or related to the PMS documentation system within the SLPS Academics Office.

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

2.0 RESPONSIBILITY:

- 2.1 Management Representative

3.0 APPROVAL AUTHORITY:

- 3.1 Management Representative

Signature

Date

4.0 DEFINITIONS:

- 4.1 QAS – Quality Assurance System
4.2 SLPS – Saint Louis Public Schools

5.0 PROCEDURE:

- 5.1 Documentation used by the SLPS covered by this procedure includes documentation required by the ISO 9001:2000 Standard. This documentation includes:
- 5.1.1 The tier one Process Management Manual (PMS-M001);
 - 5.1.2 Department handbooks/manuals as referenced in the departmental procedures prefixed by the department's three letter code and suffixed with "M" (for manual), followed by a three digit sequential numbering scheme;
 - 5.1.3 Procedures, prefixed by the department's three letter code and suffixed with "P" (for procedure), followed by a three digit numbering scheme;
 - 5.1.4 Work instructions, as required and referenced, prefixed by the department's three letter code and suffixed with "W" (for work instruction), followed by a three digit numbering scheme;
 - 5.1.5 Forms, as referenced in manuals, procedures and/or work instructions prefixed by the department's three-letter code and suffixed with "F" (for form), and followed by a three digit-numbering scheme.
 - 5.1.6 Lists, as referenced, prefixed by the department's three-letter code and suffixed with "L" (for list), followed by a three digit-numbering scheme.
 - 5.1.7 Guidelines, as referenced, prefixed by the department's three-letter code and suffixed with "G" (for guidelines) followed by a three digit-numbering scheme
- 5.2 Documentation used in the continuous improvement system is approved prior to release according to the requirements of the document's approval authority, this Document Control Procedure, and/or the Document Control Form (PMS-F001).
- 5.3 Minimum approval requirements are as follows:

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- 5.3.1 Tier one Continuous Systems Improvement Manual: Superintendent, Management Representative and Management Review Team;
- 5.3.2 Other department manuals: Department manager/supervisor;
- 5.3.3 Tier two procedures: Departmental manager/supervisor;
- 5.3.4 Tier three work instructions: Departmental manager/supervisor;
- 5.3.5 Tier four forms: Departmental manager/supervisor (as specified on the Document Control Form PMS-F001).
- 5.3.6 Tier five lists: Departmental manager/supervisor.
- 5.4 Revisions or deletions are approved by the same functions that originally approved the documents during the initial implementation prior to release of the change.
- 5.5 Documentation is reviewed at least annually to determine the need for revision. The Document Control Form (PMS-F001) is used to report these revisions. This review completion is reported in the management review meetings.
- 5.6 The most current documentation is made readily available to those performing the tasks defined. Availability is primarily through the Internet documentation site. Any hard copy document(s) is to be for reference only.
- 5.7 A master list of documents in the quality system is maintained and is readily accessible through the Internet.
- 5.8 Documentation is legible and readily identifiable to ensure proper use and deployment of the quality system.
- 5.9 Documentation that is controlled externally to the quality system, such as state standards, etc., is listed on an external documents list, and controlled in a way appropriate to the process requiring the document.
- 5.10 Any obsolete documents are removed either from the Internet site or from hard copy location to prevent unintended use. In the event obsolete documentation is retained, the electronic copies are filed in an electronic archive file and hard copies are filed with remaining department files in cabinet.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Document Control Form PMS-F001

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Document Control Form (PMS – XXXX)	Electronic Folder	3 years	Discard as desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
3/02/20		Initial Release

*** End of procedure ***

Preventive Action Procedure (PMS-P004)

Academic Office

1.0 SCOPE:

- 1.1 This procedure is applicable when data analyzed requires the need to initiate preventive action.

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

2.0 RESPONSIBILITY:

- 2.1 Management Representative
2.2 Management Review Team

3.0 APPROVAL AUTHORITY:

- 3.1 Management Representative

Signature

Date

4.0 DEFINITIONS:

- 4.1 n/a

5.0 PROCEDURE:

- 5.1 The Academics Office will determine the action required eliminating the causes of potential problems (nonconformities) in order to prevent their occurrence
- a) Actions shall be appropriate to the effects of the potential problems.
- 5.2 Potential nonconformities and their causes are determined during the Management Review process during the analysis of data in reports identifying trends not acceptable to the district, or other forms of data.
- a) Any staff member can submit a Preventive Action Request Form (PMS-F002).
- 5.3 These reports are evaluated and action required to prevent the occurrence of nonconformities is determined.
- 5.4 The action required is then implemented and documented in the Management Review Meeting minutes and on the Preventive Action Log.
- 5.5 These records are maintained per the Record Retention Table below.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Preventive Action Log (PMS – F007)
6.2 Preventive Action Request Form (PMS – F002)

ACADEMIC PROCESS MANAGEMENT PROGRAM

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Preventive Action Log	Electronic Folder	3 years	Discard as Desired	Password Protected Folder
Preventive Action Request Form	Electronic Folder	3 years	Discard as Desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
3/02/20		Initial Release

*** End of procedure ***

Customer Satisfaction Procedure (PMS-P005)

Academic Office

1.0 SCOPE:

- 1.1 This procedure applies to the Academics Office to ensure customer satisfaction

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

2.0 RESPONSIBILITY:

- 2.1 Management Representative
2.2 Management Review Team

3.0 APPROVAL AUTHORITY:

- 3.1 Management Representative

Signature

Date

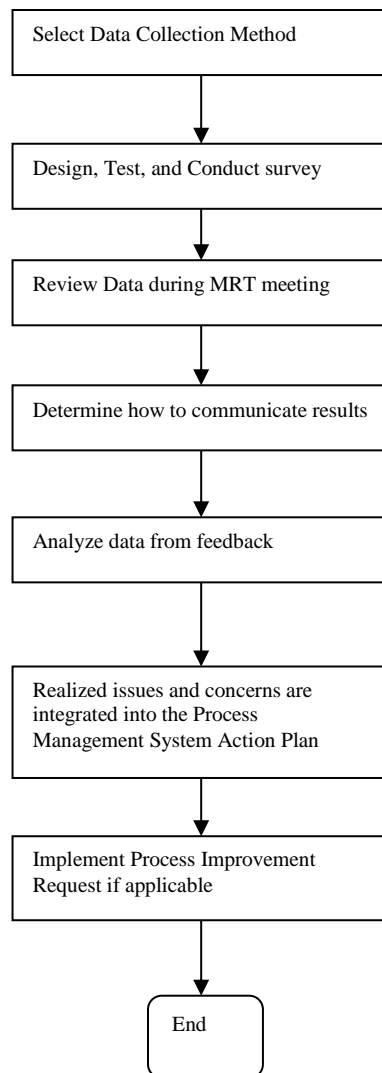
4.0 DEFINITIONS:

- 4.1 n/a

5.0 PROCEDURE:

- 5.1 The Academics Office solicits and conducts periodic surveys of the district and the community as one of the measurements of the performance of the Academics Office Process Management System.
- 5.2 Information relating to the customer(s) perception is monitored and reviewed during the Management Review Team Meetings. This process aids in determining whether customer requirements are being met.
- 5.3 Methods for obtaining and using this information includes, but is not limited to the following:
- a) Department Customer Surveys – This information is compiled and a report is prepared for the Management Review Team. The results and actions taken are documented in the Management Review Team Minutes.
 - b) Other Customer Surveys may be conducted using general questionnaires, feedback forms, etc. Data from surveys are gathered, reviewed and acted upon accordingly.
- 5.4 Issues and/or concerns are realized based on the feedback analysis.
- 5.5 Corrective and/or preventive action plans are implemented when applicable.
- 5.6 A flow chart detailing the steps of this process can be found in Exhibit A.

Exhibit A



ACADEMIC PROCESS MANAGEMENT PROGRAM

6.0 ASSOCIATED DOCUMENTS:

6.1 Management Review Minutes

6.2 Customer Survey Reports

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Management Review Team Minutes	Electronic Folder	3 years	Discard as desired	Password Protected Folder
Customer Survey Report	Electronic Folder	3 years	Discard as desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
3/02/20		Initial Release

*** End of procedure ***

Quality Records Procedure (PMS-P006)

Academic Office

1.0 SCOPE:

- 1.1 This outlines the process for maintaining quality records related to the Process Management System.

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

2.0 RESPONSIBILITY:

- 2.1 Process Owners

3.0 APPROVAL AUTHORITY:

- 3.1 Management Representative

Signature

Date

4.0 DEFINITIONS:

- 4.1 PMS – Process Management System
4.2 SLPS – Saint Louis Public Schools District

5.0 PROCEDURE:

- 5.1 Records maintained to provide evidence of the conformity, implementation, and effective operation of the process management system are defined in each procedure and/or work instruction
- a) The identification, retention, storage, and disposition of each record are defined in the record retention table of the document.
- 5.2 Records retained are required to be legible, readily identifiable, and appropriately retrievable.
- 5.3 The following controls are in place for quality records.
- a) Retrieval: This section is not listed in the quality records table. Retrieval for all records listed is through the process owner or associated business analyst.
- b) Identification: The title of the record is identified in each of the documents Records Table.
- c) Storage: The storage of the record is defined by whether the record is hard copy or electronic and where the record is stored. This requirement is listed in each document Record Table.
- d) Protection: Protection of documents is primarily through electronic back-up, fireproof locations, or where the loss of the record would not adversely affect the system. Hard copy records are always maintained in secured offices in standard file cabinets.
- e) Retention time: This requirement, listed on the record retention table of each document indicates the minimum period that the record is to be maintained. In addition, the retention may be in terms of quantity such as the last three revisions of the document.
- f) Disposition: The disposition of each quality record is listed in the Records Table. The disposition may include archiving the record if electronic, shredding the record, deleting the record, discarding the record or by any other means that is the discretion of the process owner or business analyst. This is indicated as "Discard as Desired" on the records

ACADEMIC PROCESS MANAGEMENT PROGRAM

retention table of the document. In the case of SLPS, “discard as desired” is achieved thru shredding.

- 5.4 It is the responsibility of the Management Representative and/or process owner to maintain the quality records table found in each procedure and/or work instruction.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 All procedures and work instructions that include the record retention table

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
N/a	N/a	N/a	N/a	N/a

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
3/02/20		Initial Release

***** End of procedure *****

PMS Internal Quality Audit Procedure (PMS-P007)

Academic Office

1.0 SCOPE:

- 1.1 This procedure applies to all personnel directing and administering internal management system audits in the SLPS Academics Office.

2.0 RESPONSIBILITY:

- 2.1 Deputy Superintendent for Academics / CAO

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

- 3.1 Management Representative

Signature

Date

4.0 DEFINITIONS:

- 4.1 PMS – Process Management System Program
4.2 SLPS – Saint Louis Public Schools
4.3 MRT – Management Review Team
4.4 CAR – Corrective Action Request

5.0 PROCEDURE:

- 5.1 St Louis Public Schools conducts internal quality audits according to a schedule developed and maintained by the Lead Auditor and Management Representative. This Audit Schedule is modified, as needed, taking into consideration the status and importance of areas to be audited. All areas of the PMS - ISO certification scope will be audited annually.
- a) Internal audits may be required, in addition to the above requirements, by the Management Review Team.
- 5.2 Internal quality audits are conducted to determine if the process management system at SLPS Academics Office conforms to the requirements of ISO 9001:2000 as well as documented procedures and is effectively implemented and maintained.
- a) The Management Representative and Lead Auditor will outline the audit scope, objectives, the audit performance, and reporting methods.
- 5.3 Internal consultants plan the audits by preparing an Audit Checklist prior to the start of the audit. This involves the review of previous audit results, CARs opened and/or closed (see CAIR Log) in the department being audited; any non-conformance statements associated documents and processes in order to ensure an effective and efficient audit process.
- a) Internal consultants may re-verify non-conformance CAR's as a means of demonstrating conformity of the PMS.
- b) Internal consultants send the department selected to be audited an Audit Notification (PMS-F013).

ACADEMIC PROCESS MANAGEMENT PROGRAM

- 5.4 The consultants selected to perform internal quality audits are objective and impartial of the process to be audited. No consultant will be permitted to audit his or her own work.
- 5.5 Internal consultants at the conclusion of the internal audit prepare an Audit Reports PMS-F011). In the event that the internal audit uncovered nonconformities in the continuous systems improvement program, the Internal Consultant shall complete a CAR and submit all documentation to the Lead Auditor and/or Management Representative.
 - a) The Management Representative will update the Tentative Audit Schedule (PMS-F015), apply any necessary control numbers to process correction requests, make appropriate copies, and forward the Internal Audit Correction Form to the responsible manager.
- 5.6 The responsible manager of the area audited shall take corrective action and/or eliminate the cause of the non-conformity without delay and in the time frame specified by the form, and return the form to the Management Representative.
 - a) If the manager cannot respond by the requested time on the document, the manager must notify the Management Representative for an extension
- 5.7 The Management Representative will review the corrective action, request any modifications if needed, and file
- 5.8 When the implementation date of the Corrective Action Request has been reached, the Management Representative will assign the follow-up activity to an Internal Consultant who will record the verification activity performed and results. The form is then returned to the Management Representative and/or Lead Auditor who takes any appropriate action resulting from the follow-up audit.
- 5.9 The Lead Auditor and management representative prepare an Audit Summary Report as early as possible, but not later than two (2) weeks after completion of the audit. The report is based on non-conformances, observations and findings of the internal consultants.
 - a) Lead Auditor communicates the results of the audit report to the MRT and to the departments audited.
- 5.10 The Management Representative shall maintain records of audits (Audit Schedule, Audit Notification, Audit Checklist, Internal Audit Report, and Summary Report) for a minimum period of five (5) years in the Quality Audit files

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Internal Audit Schedule (PMS – F015)
- 6.2 Audit Notification (PMS – F013)
- 6.3 Corrective Action Request PMS – F001)
- 6.4 Internal Audit Checklists (PMS – F010)
- 6.5 Internal Audit Report (PMS – F011)
- 6.6 Internal Audit Summary Report (PMS – F016)
- 6.7 Corrective Action Request Log (PMS – F006)
- 6.8 Auditing Activity, before, During, and PMS Audit – PMS – W003)
- 6.9 ISO 9001:2000 Standard

ACADEMIC PROCESS MANAGEMENT PROGRAM

6.10 Internal Audit Correction

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Audit Schedule	Electronic Folder	3 years	Discard as desired	Password Protected Folder
Audit Notification Form	Electronic Folder	3 years	Discard as desired	Password Protected Folder
Internal Audit Checklist	Electronic Folder	3 years	Discard as desired	Password Protected Folder
CAR Form	Electronic Folder	3 years	Discard as desired	Password Protected Folder
Internal Audit Report	Electronic Folder	3 years	Discard as desired	Password Protected Folder
Internal summary Report	Electronic Folder	3 years	Discard as desired	Password Protected Folder
CAR Log	Electronic Folder	3 years	Discard as desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
3/02/20		Initial Release

* * * E n d o f p r o c e d u r e * * *

Control of Non-Conforming Processes, Services or Products Procedure (PMS-P008)

Academic Office

1.0 SCOPE:

- 1.1 This procedure applies to any process, services or product, which are identified as Non-conforming, within the scope of the district's ISO certification at the SLPS Academics Office

2.0 RESPONSIBILITY:

- 2.1 Department Managers
2.2 Management Representative

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

- 3.1 Management Representative

Signature

Date

4.0 DEFINITIONS:

- 4.1 PMS – Process Management System Program
- 4.2 External Audits – Audits conducted by an accredited registrar to verify the Academics Office PMS Program conforms to the requirements of ISO 9001:2000 as well as meets customer requirements and continuously improves.
- 4.3 Internal Quality Audits – Audits conducted to determine if the PMS program of the SLPS Academics Office conforms to the requirements of ISO 9001:2000 as well as documented procedures and is effectively and efficiently implemented and maintained.

5.0 PROCEDURE:

- 5.1 Processes, services and/or products within the district that are considered to be nonconforming may be identified in any of the following ways:
- a) Incoming product from suppliers: Product received from suppliers, which are found to be nonconforming, are identified, reported and returned to the supplier. Recurring problems with discrepant materials from a vendor should be reported to the Purchasing Department.
 - b) Services provided by external sources: If a service provided from an external source does not comply with the requirements of the purchase order and/or contract, then the Quality Assurance Improvement Request Form is completed and submitted.
 - c) Processes within the district producing negative results: Any process in the district, which does not produce an acceptable result, may be reported by any employee through the initiation of the Corrective Action Request Form per PMS-F001.
 - d) Internal Quality Audits: During the process of conducting internal quality audits, processes may be identified as being nonconforming. These are documented on the Internal Audit Checklist, Internal Audit Report Form, and a Corrective Action Request Form

ACADEMIC PROCESS MANAGEMENT PROGRAM

- e) External Audits: Any nonconformance is noted during external audits are corrected through the Corrective Action Request Procedure (PMS-P002).
- 5.2 Once identified, prior to, after delivery or use has started, the nonconformance shall be addressed and the SLPS Academics Office shall:
- a) Take appropriate action to eliminate the nonconformity;
 - b) Authorize its use, release, or acceptance (with proper authority); and/or
 - c) Take action to preclude its original intended use or application.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Corrective Action Request Form (PMS – F001)
- 6.2 Internal Audit Checklist (PMS - F010)
- 6.3 Internal Audit Report (PMS – F011)
- 6.4 Corrective Action Request Procedure (PMS – P002)
- 6.5 Internal Quality Audit Procedure (PMS – P007)

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Corrective Action Request Forms	Electronic Copy	3 years	Discard as desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
3/02/20		Initial Release

*** End of procedure ***

Continuous Improvement Procedure (PMS-P009)

Academic Office

1.0 SCOPE:

- 1.1 This procedure communicates the process that engages the SLPS Academics Office stakeholders in the identification, design, development, and implementation of strategic and operational initiatives necessary to achieve the mission within the SLPS Academics Office.

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

2.0 RESPONSIBILITY:

- 2.1 Deputy Superintendent for Academics / CAO
2.2 Management Representative
2.3 Academic Leadership Team

3.0 APPROVAL AUTHORITY:

Signature

Date

- 3.1 Deputy Superintendent for Academics / CAO
3.2 Management Representative

4.0 DEFINITIONS:

- 4.1 Approval - Refers to the formal acceptance of a policy, procedures, practice, program, etc. Status, contract, or other reasons sometimes require approval
4.2 PMS – Process Management System Program
4.3 ALT– Academic Leadership Team.
4.4 MRT – Management Review Team
4.5 Quality Action Plan – A focused plan developed by the MRT on those aspects of the PMS that need special attention
4.6 Stakeholders -- students, parents, staff, community
4.7 SLPS – Saint Louis Public Schools

5.0 PROCEDURE:

- 5.1 The Academic Office will continually improve the effectiveness of the Process Management System Program through the use of the quality policy, district objectives, audit results, analysis of data, corrective and preventive actions, and root cause analysis, the Quality Action Plan, The Transformation Plan, and management review.
5.2 Academic Leadership Team meets monthly (scheduled Leadership Team meeting) to consider opportunities for improvement.
5.3 Authority is delegated so that people are empowered and accept responsibility to identify opportunities where the Academics Office can improve its performance.

ACADEMIC PROCESS MANAGEMENT PROGRAM

- 5.4 MRT reviews the Corrective Action Request (PMS-P002 Process Improvement Request Procedure) reports and allocates resources needed to implement preventive action, if applicable (see Management Responsibility, Section 5, in the PMS Manual PMS-M001).
- 5.5 Customer feedback because of customer complaints and/or customer surveys conducted, when required.
- 5.6 MRT evaluates the data from the Corrective Action Log for concerns, patterns, trends, and non-conformances.
- 5.7 The SLPS PMS Quality Action Plan is enhanced and reviewed, as applicable, by MRT after reviewing, monitoring reports Corrective Action Request and Internal Audits), feedback and information from surveys.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Management Review Procedures (PAS – P001)
- 6.2 PMS Internal Audit Summary Reports
- 6.3 PMS Quality Action Plan (PMS - M002)
- 6.4 Transformation Plan

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Corrective Action Log	Electronic Folder	3 years	Discard as Desired	Electronic Folder
SC meeting Minutes	Electronic Folder	3 years	Discard as Desired	Electronic Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
3/2/20		Initial Release

* * * E n d o f p r o c e d u r e * * *

Revising, Adding, or deleting a Document Work Instruction
(PMS – W001)
Academic Office

1.0 SCOPE:

- 1.1 This work instruction outlines the process for revising, adding, or deleting a document in the Process Management System within the SLPS Academics Office.

2.0 RESPONSIBILITY:

- 2.1 Management Representative

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

Signature _____

Date _____

- 3.1 Deputy Superintendent for Academics / CAO

- 3.2 Management Representative

4.0 DEFINITIONS:

- 4.1 PMS – Program Management System Program

5.0 PROCEDURE:

- 5.1 **Adding:** To add a new document to the Process Management System Program, the Process Owner either independently or with the help of the Management Representative creates the new document in the hard copy or electronic form.

- a) The Process Owner indicates on the Document Control Form that this is the addition of a new document and completes Section 2 of the form.
- b) The Process Owner forwards the completed form, along with a hard copy or electronic copy of the new document, to the Management Representative for approval.
- c) The Management Representative forwards the approved form and document to Institutional Advancement for posting to the PMS Webpage.
- d) The Management Representative signs, dates, and file the Document Control Form, and notifies the Process Owner of the posting.
- e) Any issues concerning the new document are resolved between the Process Owner and the Management Representative.

- 5.2 **Revising:** To revise a document already in the system, the Process Owner indicates on the Document Control Form that a revision is needed and completes Section 1 of the form.

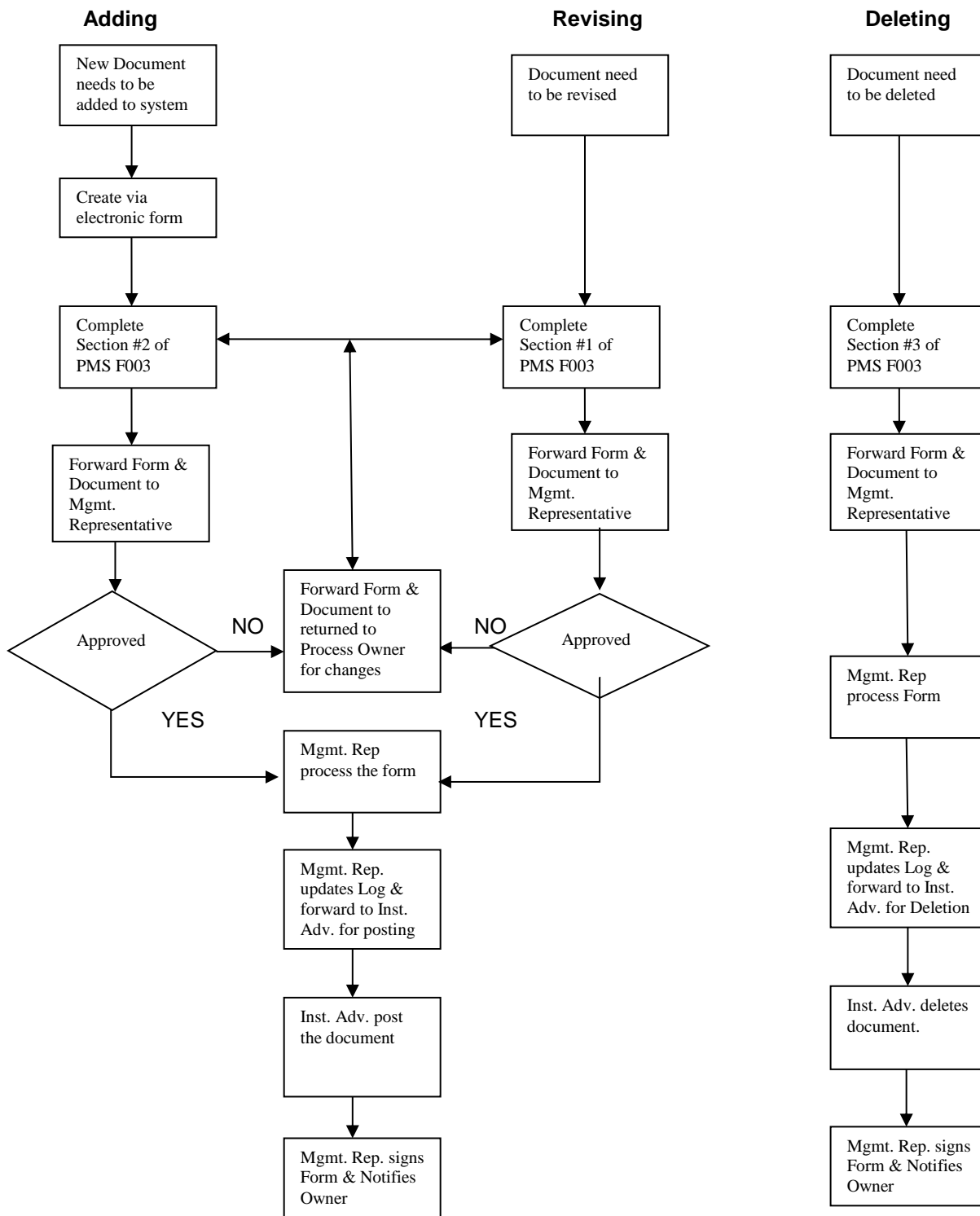
- a) The Process Owner forwards the completed form, along with a hard copy or electronic copy of the revised document to the Management Representative.
- b) The Management Representative handles the document in the same way as described in steps 5.1c through 5.1e.

- 5.3 **Deleting:** To delete a document in the system, the Process Owner indicates on the Document Control Form that a deletion is needed and completes Section 3 of the form.

ACADEMIC PROCESS MANAGEMENT PROGRAM

- a) The Process Owner forwards the completed form, along with a hard copy or electronic copy of the document to be deleted, to the Management Representative.
- b) The Management Representative reviews the document and form to ensure approval for the deletion.
- c) The Management Representative updates the Document Control Log and forwards the electronic copy to the Institutional Advancement Department.
- d) Institutional Advancement uses the electronic copy as a reference for deleting posted document from the PMS Webpage.
- e) The Management Representative signs, dates, and files the Document Control Form.

Exhibit A



ACADEMIC PROCESS MANAGEMENT PROGRAM

6.0 ASSOCIATED DOCUMENTS:

6.1 Document Control Form PMS-F003

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Document Control Form PMS-F003	Electronic Folder	3 years	Discard as Desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
3/02/20		Initial Release

*** End of procedure ***

Internal PMS Audit Work Instruction
(PMS – W002)
Academic Office

1.0 SCOPE:

- 1.1 This work instruction outlines the process for administering internal management system audits within the SLPS Academic Office.

2.0 RESPONSIBILITY:

- 2.1 Deputy Superintendent for Academics / CAO

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

Signature

Date

- 3.1 Management Representative

4.0 DEFINITIONS:

- 4.1 N/C – Non conformance
4.2 PMS – Program Management System Program
4.3 CAR – Corrective Action Request

5.0 PROCEDURE:

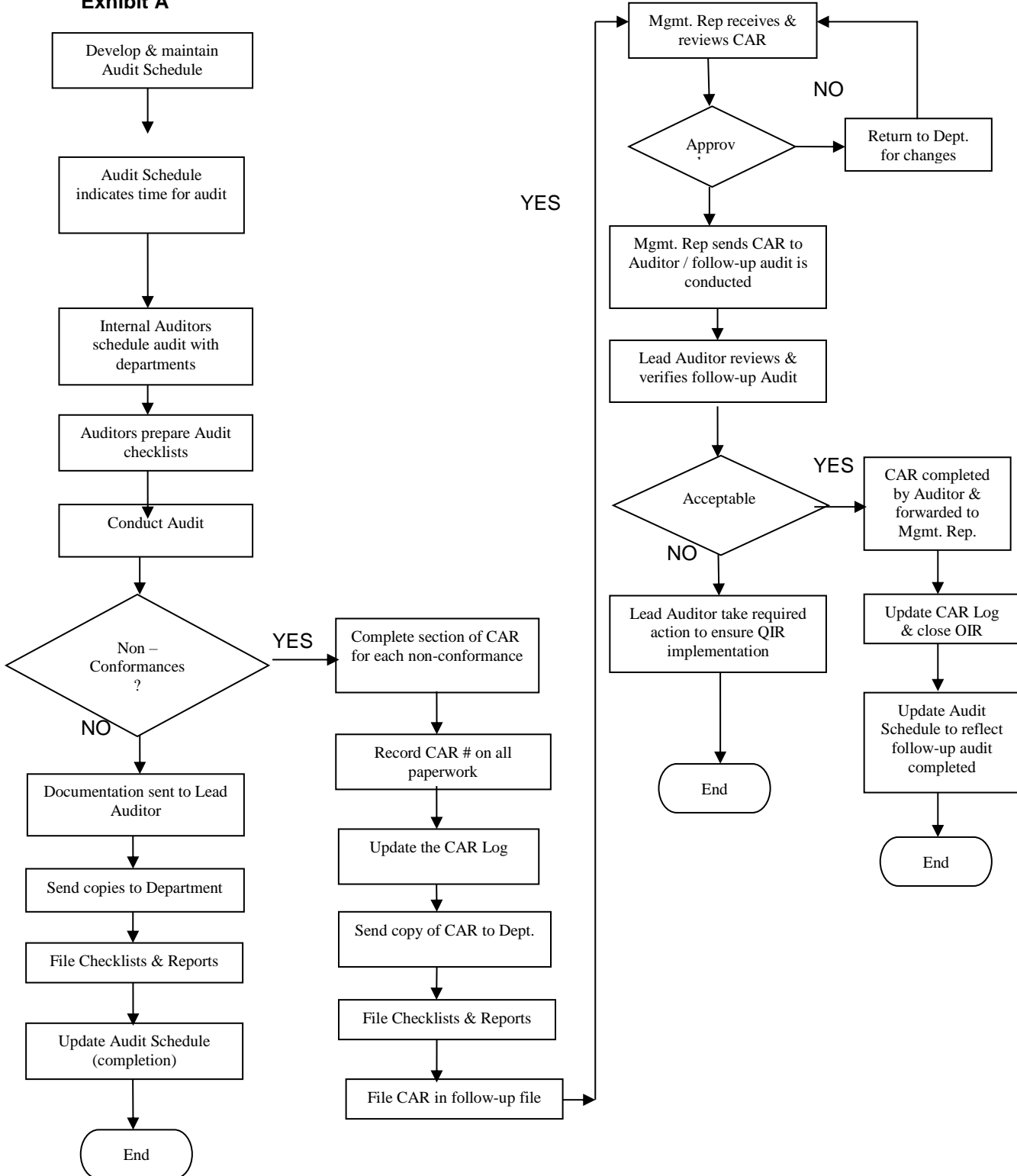
- 5.1 The Academic Office conducts internal quality audits according to a schedule developed and maintained by the Lear Auditor and Management Representative. This Audit Schedule is modified, as needed, taking into consideration the status and importance of areas to be audited. All areas of the PMS – ISO certification scope will be audited annually.
- a) Internal audits may be required, in addition to the above requirements, by the Management Review Team.
- 5.2 Internal quality audits are conducted to determine if the Process Management System conforms to the requirements of ISO 9001: 2000 as well as documented procedures and is effectively implemented and maintained.
- a) The Management Representative and Lead Auditor will outline the audit scope, objectives, the audit performance, and reporting methods.
- 5.3 Internal consultants plan the audits by preparing an Audit Checklist prior to the start of the audit. This involves the review of previous audit results, CAR is opened and / or closed (see CAR Logs) in the department being audited, any non-conformance statements associated documents and processes in order to ensure an effective and efficient audit process.
- a) Internal consultants may re-verify non-conformance CAR's as a means of demonstrating conformity of the PMS.
- b) Internal consultants selected to be audited an Audit Notification (PMS – F013).
- 5.4 The consultants selected to perform internal quality audits are objective and impartial of the process to the audited. No consultant will be permitted to audit his or her own work.
- 5.5 Internal Consultants at the conclusion of the internal audit prepare an Audit Report (PMS-F011). In the event that the internal audit uncovered nonconformities in the Process Management

System Program, the Internal Consultant shall complete a CAR and submit all documentation to the Management Representative.

- a) The Management Representative will update the Tentative Audit Schedule (PMS F015), apply any necessary control numbers to process correction requests, make appropriate copies, and forward the Corrective Action Request Form to the responsible manager.

5.6 The responsible manager of the area audited shall correct and / or eliminate the cause of the non-conformity immediately, and return the form to the management Representative.

Exhibit A



ACADEMIC PROCESS MANAGEMENT PROGRAM

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Management Review Agenda
- 6.2 Management Review Meeting Minutes

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Management Review Agenda, Sign-in Sheet and Meeting Minutes	Electronic Folder	3 years	Discard as desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
01/28/08		Initial Release

***** End of procedure *****

**Auditing Activity Before, During and After PMS Audit
Work Instruction
(PMS – W003)
Academic Office**

1.0 SCOPE:

- 1.1 This work instruction outlines the process for conducting an Auditing Activity within the SLPS Academics Office.

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

2.0 RESPONSIBILITY:

- 2.1 Management Representative

- 2.2 Lead Auditor

Signature

Date

3.0 APPROVAL AUTHORITY:

- 3.1 Deputy Superintendent for Academics / CAO

4.0 DEFINITIONS:

- 4.1 PMS – Program Management System Program

- 4.2 Chief Academic Officer

5.0 PROCEDURE:

Preparing for the audit

- 5.1 Consultants are recommended to audit as a team whenever possible
- 5.2 Consultant teammates are to meet and review the Internal Audit Checklist for the department being audited to prepare additional questions for the internal audit.
- 5.3 The following paperwork will need to be obtained:
- a) Process Management System Manual with attachments.
 - b) Internal Process Audit Procedure.
 - c) Procedure to be audited.
 - d) Audit Notification Form.
 - e) Internal audit Planning Document.
 - f) Previous audit questions and answers
 - g) Copies of any corrective actions presented to the department being audited
 - h) Internal audit report form previous audit, if any.

During the audit

- 5.4 If no corrective actions are open/closed to the department being audited, the consultant will check for any concerns mentioned in the previous audit.

ACADEMIC PROCESS MANAGEMENT PROGRAM

- 5.5 Consultants will ask if the concerns have been taken care of in the previous audit and will be reviewed. Consultants are to refer to the forms listed under the Associated Documents and Records retention Table in the body of the procedure being audited for other documents that will need to be reviewed.
- 5.6 Consultants refer to the last audit's questions and answers for any concerns that need to be followed up on.
- 5.7 Consultants will remind the department to fill out a customer survey for input on how the audit went. This will help with the continuous improvement for auditing.

After the audit

- 5.8 Schedule time to fill out paperwork with consultant teammate(s) immediately following the audit.
- a) Both consultant's must fill out and sign the Internal Audit Report prior to submitting to the Lead Auditor
 - b) Paperwork needed.
 - 5.8.b.1 Internal Audit Report Form
 - 5.8.b.2 Corrective Action Request Form, if applicable.
- 5.9 The Internal Audit Report with all supporting documentation (samples, notes, planning documentation) is to be turned into the Management Representative.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Process Management Systems Manual (PMS – M001)
- 6.2 Internal Process Audit Procedure (PMS – P007)
- 6.3 Internal Audit Checklist (PMS – F010)
- 6.4 Internal Audit Report (PMS – F011)
- 6.5 Internal Audit Planning Form (PMS – F012)
- 6.6 Audit Notification Form (PMS – 013)
- 6.7 Internal Audit Work Instruction (PMS – W002)
- 6.8 Corrective Action Request Form (PMS – F001)

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Internal Audit Report	Electronic Folder	3 years	Discard as Desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
3/2/20		Initial Release

*** End of procedure ***

PILOT PROGRAMS APPROVAL PROCEDURE (CAO P001)

Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the process for seeking approval implementing Pilot Programs in individual Classrooms, Specific Schools, and throughout SLPS

2.0 RESPONSIBILITY:

- 2.1 Principals
2.2 Curriculum Supervisors
2.3 Deputy Superintendent for Academics

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

- 3.1 Deputy Superintendent for Academics

Signature _____

Date _____

4.0 DEFINITIONS:

- 4.1 SLPS – Saint Louis Public Schools
4.2 **PILOT** – A pilot program is an experimental trial of an educational innovation. The pilot process will investigate, inform, and evaluate the potential for future district implementation.

5.0 PROCEDURE:

- a) Idea created at the local level initiated by students, teachers, parents and/or community group. Initial plan presented to the school principal. The principal determines the “scope or scale” of the proposed innovation.
- b) The Proposal for a Pilot Program is initiated at the School Level
- c) The proposal to the principal needs to include:
- d) Demonstrated Interest or Need:
 - 5.1.d.1 How will this innovation promote student learning and the district’s vision, mission, goals and core curriculum?
- e) Brief description of how this pilot/project will meet the current needs not being met by other courses/programs (needs assessment)
 - 5.1.e.1 Statement on impact (How will this innovation impact SLPS in both the short and long-term? Take into consideration staffing, training needs, facilities, costs, equipment/materials and/or impact on other programs and/or schools)
- f) Approximate cost (include funding source if available)
- g) Evaluation Plan (How will the success of the program be measured?)
- h) Timeline for pilot/project.
- i) Evidence of successful programs elsewhere OR research supporting the proposal if no such program is available elsewhere as a model. And
 - 5.1.i.1 Communication plan appropriate to scale of the pilot.

5.2 Approval Process Flow

- 5.2.a.1 Principal submits Pilot Proposal to Curriculum Supervisor for approval
 - 5.2.a.1.1 If not approved the proposal is sent back to the Principal
- 5.2.a.2 Curriculum Supervisor submits proposal to the Deputy Superintendent

ACADEMIC PROCESS MANAGEMENT PROGRAM

5.2.a.2.1 If not approved the proposal is sent back to the Curriculum Supervisor

5.2.a.3 Deputy Superintendent informs the Curriculum supervisor and Principal that the Pilot Program Proposal is approved

6.0 ASSOCIATED DOCUMENTS:

6.2 Pilot Approval Form

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Pilot Approval Form	Electronic Folder	3 Years	Discard as Desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
10/01/19		Initial Release

*** End of procedure ***

**TRANSFER OF KNOWLEDGE PROCESS
PROCEDURE (CAO – P002)**

Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the process for the transfer of Knowledge from an Exiting Academic Office Staff Member to an Onboarding Academic Office Staff Member within Saint Louis Public Schools.

2.0 RESPONSIBILITY:

- 2.1 Exiting Academic Office Staff Member
2.2 Onboarding Academic Office Staff Member
2.3 Operations Coordinator for the Academic Office

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

Signature

Date

- 3.1 Deputy Superintendent for Academics / CAO

4.0 DEFINITIONS:

- 4.1 SLPS – Saint Louis Public Schools

5.0 PROCEDURE:

- 5.1 Academic Office Staff Member informs the Deputy Superintendent for Academics / CAO of his / her decision to transfer out of the Office or leave the District.
- 5.2 The Exiting Staff Member, Supervisor, and Operations Coordinator for the Academic Office collaborate to schedule a date to collect the Data identified within the Academic Office Transfer of Knowledge Template.
- 5.3 The Exiting Staff Member, Completes the Transfer of Knowledge Template, and share all relevant information with Supervisor, Onboarding Academic Office Staff Member and Operations Coordinator for the Academic Office.
- 5.4 Copies of the completed form are kept on file with the Supervisor and Operations Coordinator for the Academic Office

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Academic Office Knowledge of Transfer Template

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Transfer of Knowledge Form	Electronic Folder	5 years	Discard as Desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
11/3/19		Initial Release

* * * E n d o f p r o c e d u r e * * *

**VOUCHERS PAYMENT PROCEDURE
(CAO-P004)**

Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the current process used to process Vouchers for Payment within the Academic Office

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

2.0 RESPONSIBILITY:

- 2.1 Teaching and Learning Administrators
- 2.2 Professional Development Administrators
- 2.3 Leadership Development Administrators
- 2.4 College and Career Readiness Administrators
- 2.5 Gifted and Talented Administrators
- 2.6 Early Childhood Education Administrators
- 2.7 Special Education Administrators
- 2.8 Athletic Office Administrators
- 2.9 ESOL Bilingual Migrant Program Administrators
- 2.10 Saint Louis Plan Administrators
- 2.11 Academic Office Administrators
- 2.12 Operations Coordinator for Academics
- 2.13 Executive Secretary to CAO
- 2.14 Clerical Support for the Academic Office

3.0 APPROVAL AUTHORITY:

- 3.1 Deputy Superintendent for Academics

Signature

Date

4.0 DEFINITIONS:

- 4.1 n/a

5.0 PROCEDURE:

- 5.1 Administrators will submit original copies of Vouchers Request for Payment and supporting documents to the Operations Coordinator for Academics
- 5.2 The Operations Coordinator for Academics will perform a document check of submitted Voucher request for payment

ACADEMIC PROCESS MANAGEMENT PROGRAM

5.2.a.1 The list of required documents are identified in the Work Instruction CAO – W001, Preparing Vouchers for Payment.

- b) If any of the required documents are **missing** or if any the required fields with the documents are **not completed correctly**, the Voucher request for payment will be returned to the submitter for corrections.

5.2.b.1 The Operations Coordinator for Academics will record the documents as returned to the submitter for corrections.

- c) If the required documents were submitted and all fields within the document **were completed correctly**

5.2.c.1 The Operations Coordinator for Academics will perform a quality check of the complete set of documents

- d) After completion of the Quality Check the Documents are given to the Deputy Superintendent for Academics for Approval Signature
- e) After the Approval Signature is received the documents are given to the Operations Coordinator for Academics
- f) The Approved Voucher Payment Request Form and Documentation is walked to Accounts Payable for Processing

6.0 ASSOCIATED DOCUMENTS:

6.1 Preparing Vouchers for Payment CAO – W001

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Voucher	Electronic Folder	3 years	Discard as Desired	Password Protected Folder
Receipts	Electronic Folder	3 years	Discard as Desired	Password Protected Folder
Meeting Agenda	Electronic Folder	3 years	Discard as Desired	Password Protected Folder
Sign-in Sheet	Electronic Folder	3 years	Discard as Desired	Password Protected Folder
Expense Report	Electronic Folder	3 years	Discard as Desired	Password Protected Folder
Auth. for Travel	Electronic Folder	3 years	Discard as Desired	Password Protected Folder
Expense Report	Electronic Folder	3 years	Discard as Desired	Password Protected Folder
IN-90	Electronic Folder	3 years	Discard as Desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
10/23/19		Initial Release

*** End of procedure ***

MILEAGE REIMBURSEMENT PROCEDURE

(CAO – P005)

Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the current process used to process Request for Mileage Reimbursement within the Academic Office

2.0 RESPONSIBILITY:

- 2.1 Teaching and Learning Administrators
- 2.2 Professional Development Administrators
- 2.3 Leadership Development Administrators
- 2.4 College and Career Readiness Administrators
- 2.5 Gifted and Talented Administrators
- 2.6 Early Childhood Education Administrators
- 2.7 Special Education Administrators
- 2.8 Athletic Office Administrators
- 2.9 ESOL Bilingual Migrant Program Administrators
- 2.10 Saint Louis Plan Administrators
- 2.11 Academic Office Administrators
- 2.12 Operations Coordinator for Academics
- 2.13 Executive Secretary to CAO
- 2.14 Clerical Support for the Academic Office

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

Signature

Date

- 3.1 Deputy Superintendent for Academics / CAO

4.0 DEFINITIONS:

- 4.1 CAO – Chief Academic Officer

5.0 PROCEDURE:

- 5.1 Administrators will submit original copies of Mileage Reimbursement Form and supporting documents to the Operations Coordinator for Academics
- 5.2 The Operations Coordinator for Academics will perform a document check of submitted Mileage Reimbursement Form and supporting Documentation

ACADEMIC PROCESS MANAGEMENT PROGRAM

5.2.a.1 The list of required documents are identified in the Work Instruction CAO – W002, Preparing Mileage Reimbursement Request for Payment.

- b) If any of the required documents are **missing** or if any the required fields with the documents are **not completed correctly**, the Mileage Reimbursement Request will be returned to the submitter for corrections

5.2.b.1 Operations Coordinator for Academics will record the documents as returned to the submitter for corrections.

- c) If the required documents were submitted and all fields within the document **were completed correctly**
- d) The Operations Coordinator for Academics twill submit the documents to the Deputy Superintendent for Academics / CAO for Approval Signature
- e) After the Approval Signature is received the documents are given to the Operations Coordinator for Academics
- f) The Approved Mileage Reimbursement Request and Documentation is walked to Accounts Payable for Processing

6.0 ASSOCIATED DOCUMENTS:

6.1 Preparing Mileage Reimbursement Request for Payment CAO – W002

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Mileage Request	Electronic Folder	3 years	Discard as Desired	Password Protected Folder
Budget Report	Electronic Folder	3 years	Discard as Desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
10/23/19		Initial Release

*** E n d o f p r o c e d u r e ***

**DEPUTY SUPERINTENDENT OF ACADEMICS ONBOARDING
PROCEDURE
(CAO – P007)**

Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the Departmental process for the Onboarding of a New Deputy Superintendent of Academics within Saint Louis Public Schools.

2.0 RESPONSIBILITY:

- 2.1 Chief of Staff
2.2 Incoming Deputy Superintendent of Academics
2.3 Academics Operations Coordinator for the Academic Office

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

- 3.1 Chief of Staff
3.2 Deputy Superintendent of Academics

Signature

Date

4.0 DEFINITIONS:

- 4.1 SLPS – Saint Louis Public Schools

5.0 PROCEDURE:

- 5.1 Chief of Staff informs the Academic Operations Coordinator of the pending arrival of a new Deputy Superintendent of Academics.
- 5.2 The Academic Operations Coordinator prepares the “Onboarding Checklist for Deputy Superintendent of Academics Template”
- a) The Academic Operations Coordinator assist the Academic Directors and applicable Coordinators with the collection of the documents listed on the “Checklist”.
- 5.3 The Academic Operations Coordinator will schedule the “Onboarding Meetings” between the new Deputy Superintendent of Academics and the Academic Directors and applicable Coordinators.
- 5.4 The Academic Operations Coordinator will schedule the “Onboarding Meetings” between the new Deputy Superintendent of Academics and Other Deputy Superintendents.
- 5.5 Academic Directors and applicable Coordinators will schedule meetings between the new Deputy Superintendent of Academics and Key Stakeholders and Influential Colleagues.

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- 5.6 The Academic Operations Coordinator will create a SharePoint Folder for the New Deputy Superintendent of Academics to store his / her “Onboarding Checklist Documents”.

6.0 ASSOCIATED DOCUMENTS:

Onboarding Checklist for Deputy Superintendent of Academics

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Onboarding Checklist for Deputy Superintendent for Academics	Electronic Folder	3 years	Discard as Desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
11/3/19		Initial Release
1/5/22	A	Changes to Sections 1.0, 2.0, 3.0, 5.0, and 6.0

***** End of procedure *****

**OPERATIONAL PLAN DEVELOPMENT PROCEDURE
(CAO – P008)**

Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the process for developing the Operational Plan within the Academic Office.

2.0 RESPONSIBILITY:

- 2.1 Academic Office Operations Coordinator
2.2 Academic Directors
2.3 Deputy Superintendent of Academics

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

Signature

Date

- 3.1 Deputy Superintendent for Academics / CAO

4.0 DEFINITIONS:

- 4.1 SLPS – Saint Louis Public Schools

5.0 PROCEDURE:

- 5.1 Academics Operation Coordinator conducts a workshop to discuss the purpose of the Operational Plan and the use of tools to develop the Plan.

5.1.1 Tools

5.1.1.1 Mission Statement Template

5.1.1.2 Tactical Plan Template

5.1.1.3 KPI Design Template

5.1.1.4 Diagram of Strategic Alignment of District's Objectives, Goals, and Strategies

5.1.1.5 Peer – to Peer Collaboration Template

5.1.2 Academic Directors and their staff develop their Tactical Plans

5.1.3 Assistance is provided to Academic Office Directors by the Academic Office Operations Coordinator

5.1.4 Academic Directors submit Draft Tactical Plans to Academic Office Coordinator for Review.

5.1.5 Academic Operations Coordinator will provide copies of the drafts to the Deputy Superintendent for Academics

5.2 Academics Operations Coordinator conducts Peer – to Peer Workshop

5.2.1 Problem of Practice is discussed by the Deputy Superintendent for Academics

ACADEMIC PROCESS MANAGEMENT PROGRAM

5.2.2 Theory of Action is discussed by the Deputy Superintendent for Academics

5.2.3 Purpose of the Tactical Plans is discussed by the Academic Operations Coordinator

5.2.4 Academic Directors and applicable Coordinators are paired in teams

5.2.4.1 Team members will collaborate in reviewing their procedures and provide input to each other

5.2.4.2 Gallery walk of posted procedures will be conducted during this review / input session

5.2.4.3 Teams will document their input and share out in during the Big Group S

5.2.5 Completed Peer – to Peer Documents are collected by the Academic Operations Coordinator

5.2.6 Copies are made of the completed documents and originals are returned to Academic Office Directors

5.3 Academic Directors revise their Tactical Plans

5.3.1 Academic Directors submit revised Tactical Plans to Academic Office Coordinator for Review

5.3.2 Academics Operations Coordinator provides copies of the revised Tactical plans to the Deputy Superintendent

5.4 Academic Operations Coordinator updates the Operational Plan, and provides the Draft the Deputy Superintendent for review

5.5 Operational Plan is reviewed by the Deputy Superintendent

5.5.1 Further revisions, if needed, will be at the direction of the Deputy Superintendent

5.6 The Deputy Superintendent will provide the Academic Operations Coordinator with the final approved version of the Operational Plan

6.0 ASSOCIATED DOCUMENTS:

6.1 Mission Statement Template

6.2 Tactical Plan Template

6.3 KPI Design Template

6.4 Diagram of District's Objectives, Goals, and Strategies

6.5 Peer – to- Peer Review Template

6.6 Academic Office Operational Plan

ACADEMIC PROCESS MANAGEMENT PROGRAM

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Academic Office Operational Plan	Electronic Folder	3 years	Discard as Desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
12/3/21		Initial Release

*** End of procedure ***

BUDGET DEVELOPMENT PROCEDURE
(CAO – P009)

Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the process for completing Budget Development Workbooks of the Academic Office for the New Fiscal Year.

2.0 RESPONSIBILITY:

- 2.1 Deputy Superintendent of Academics
2.2 Academics Operations Coordinator
2.3 Academic Directors

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

- 3.1 Deputy Superintendent for Academics

Signature

Date

4.0 DEFINITIONS:

- 4.1 N/A

5.0 PROCEDURE:

- 5.1 Financial Management Office provides a link to the Academic Office Budget Development Workbook to the Deputy Superintendent for Academics.
- 5.2 Deputy Superintendent for Academics forwards the Link to the Academic Operations Coordinator.
- 5.3 Academic Operations Coordinator emails the separate Budget Development Workbooks to the Academic Directors
- a) Academic Directors are given an suspense date to email the completed Budget Development Workbooks back to the Academic Operations Coordinator
- 5.3.a.1 Academic Operations Coordinator is available to provide assistance to Directors with the completion of their Budget Development Workbooks
- 5.4 Academic Directors email their completed Budget Development Workbooks to the Academic Operations Coordinator.
- a) Academic Operations Coordinator quality checks the Budget Development Workbooks for compliance with the Financial Management Office Instructions on how to complete the Budget Development Workbook
- 5.5 After the successful quality check, Academic Operations emails the final draft of the completed Budget Development Workbooks to the Deputy Superintendent for Academics
- 5.6 Deputy Superintendent for Academics review and discusses the Drafts with the Academic Directors
- 5.7 Deputy Superintendent for Academics emails the final versions to the Financial Management Office
- 5.8 Financial Management Office schedules Budget Review meeting with the Deputy Superintendent for Academics”

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6.0 ASSOCIATED DOCUMENTS:

Budget Development Workbooks

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Budget Development Workbooks	Electronic Folders	3 years	Discard as Desired	Password Protected Folder

9.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
2/9/22		Initial Release

***** End of procedure *****

**OPERATIONS MONTHLY REPORT PROCEDURE
(CAO – P010)**

Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the process for developing the Operations Monthly Report for the Academics Office.

2.0 RESPONSIBILITY:

- 2.1 Academics Operations Coordinator

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

- 3.1 Deputy Superintendent for Academics

Signature

Date

4.0 DEFINITIONS:

- 4.1 SLPS – Saint Louis Public Schools

5.0 PROCEDURE:

- 5.1 Academic Operations Coordinator will provide an Operations Monthly Report to report the progress of the following:

a) Budget

- 5.1.a.1 Spenddown of Academic Office Budget by Division
5.1.a.2 Spenddown of the Schools Budget by School Location
5.1.a.3 Spenddown of Special Funds such as ESSER II

b) Requisitions / Purchase Orders Lifecycle Management

- 5.1.b.1 By Academic Office / Schools
5.1.b.2 Purchase / Contract Requisitions processed to date.
5.1.b.3 Purchase Orders generated
5.1.b.4 Purchase Orders Fully Paid / “Closed Out”
5.1.b.5 Purchase Orders Partially Paid
5.1.b.6 Purchase Orders not paid
5.1.b.7 Requisitions Pending Approval
5.1.b.8 Requisitions Rejected
5.1.b.9 Average amount of days to process Requisitions to Purchase Orders
5.1.b.10 Outliers

c) Budget Transfers Lifecycle Management

- d) Budget Transfers submitted to date.

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- e) Budget Transfers Approved
- f) Average number of days to approve Transfers

5.2 Agreements

- a) MOUs processed to date.
- b) Contracts processed to date.
- c) Average amount of days to secure Supt. Signature on Agreements / MOUs:

5.3 Board Resolutions

- a) Resolutions scheduled for upcoming Approval Vote

5.4 Operational Plan updates

5.5 Request for Proposals updates

5.6 Strategic Projects Updates

5.7 Process Projects Updates

6.0 ASSOCIATED DOCUMENTS:

Monthly Reports

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Monthly Reports	Electronic Folder	3 years	Discard as Desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
1/5/22		Initial Release

* * * E n d o f p r o c e d u r e * * *

CONTRACTS MANAGEMENT PROCEDURE
(CAO-P011)
Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the Contract Management Process that is used in support of the Academics Office

2.0 RESPONSIBILITY:

- 2.1 Academics Operations Coordinator
2.2 Academics Office Directors
2.3 Academics Office Staff
2.4 Procurement Office Staff

3.0 APPROVAL AUTHORITY:

- 3.1 Deputy Superintendent of Academics

Signature

Date

4.0 DEFINITIONS:

- 4.1 SLPS – Saint Louis Public Schools

5.0 PROCEDURE:

- 5.1 Academics Office (all Departments) contracts are reviewed and quality checked by the Academics Operations Coordinator prior to securing the signature of the consultant(s) / vendor(s).
- 5.2 Once the quality check is successfully completed, the contract will be forwarded to Responsible Academic Director and Procurement Office for review
- a) On a parallel tracks
- 5.2.a.1 the Academics Operations Coordinator quality check the contents of the contract for compliance (all applicable sections of the contract are complete successfully)
- 5.2.a.1.1 If any section of the SLPS Contract is modified / altered by the vendor or, if the vendor is using their own vendor generated contract, the contract will be sent to SLPS Legal for review
- 5.2.a.2 If the selection of the vendor completed all sections of the contract successfully and the contract is not need of SLPS Legal review, **then** proceed to 5.2.a.4; **OR**
- 5.2.a.3 The Academic Operations Coordinator will return the proposed contract to the applicable Academic Director, with a notation that reads “the sections of the contract was completed successfully
- 5.2.a.4 The Academic Operations Coordinator will do a “Vendor ID check”, Requisition check, and Budget Availability check in BusinessPlus Requisitions” check”.

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5.2.a.5 If the Checks are successful **then** proceed to 5.3, **OR**;

5.2.a.6 The Academic Operations Coordinator will return the proposed contract to the applicable Academic Director, with a notation that reads “the proposed consultant / Vendor is not a SLPS Vendor” or a “ was entered into Business Plus, or There is not a Budget available for this service”

5.3 Once the requisite “BusinessPlus requirements” are satisfied and the quality checked contract is approved by the Procurement Office, the Academics Office Coordinator will secure the signature of the Consultant / Vendor

5.4 The consultant / vendor will email the signed contract to the Academics Office Coordinator

5.5 The Academic Operations Coordinator will forward the contract to SLPS Procurement in support of securing the Superintendent’s signature.

5.6 The Procurement Office will email a copy of the “fully executed contract” to the consultant / vendor, Academics Operations Coordinator, and the applicable consultant / vendor.

5.7 The Contract Requisition in BusinessPlus will undergo the internal BusinessPlus approval process

5.8 SLPS Procurement will generate a Purchase Order, that is automatically emailed to the consultant / vendor

5.9 Vendor / Partner starts to deliver Services to SLPS

5.10 Prior to end date of the Contractual period, the applicable Academic Office Directors will complete the SLPS Annual Vendor Performance Report

5.11 The Academic Office Director(s) will and email the completed Vendor report to the Academics Operations Coordinator

5.12 The Academic Office Coordinator will maintain a local file of completed performance reports, and email a copy of the completed Performance Report to the Procurement staff.

6.0 ASSOCIATED DOCUMENTS:

6.1 Fiscal BusinessPlus Training Manual

6.2 SLPS Procurement Manual

6.3 SLPS Contractual Agreement Template

6.4 SLPS Annual Vendor Performance Report

6.5 Academic Office Contract Management Checklist

6.6 Academic Office Agreements / Purchases / Resolutions tracker

ACADEMIC PROCESS MANAGEMENT PROGRAM

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
	Electronic Folder	TBD	TBD	Password Protected

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
1/11/23		Initial Release
2/8/23	A	Revised

*** End of procedure ***

**PROJECT MANAGER COACHING PROCEDURE
(CAO – P012)**

Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the process for providing project manager coaching to project managers during operational projects, within the Academic Office of Saint Louis Public Schools.

2.0 RESPONSIBILITY:

- 2.1 Academic Office Operations Coordinator
2.2 Project Managers

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

Signature

Date

- 3.1 Deputy Superintendent for Academics / CAO

4.0 DEFINITIONS:

- 4.1 SLPS – Saint Louis Public Schools

5.0 PROCEDURE:

- 5.1 Provides the PM with direct hands-on guidance and mentoring during a project. The Coach mentors the PM in understanding project management principles and how to apply them in this company and on this project. The coaching can provide practical nuts and bolts learning about key elements necessary for successful projects, including cross-functional involvement; overcoming technical and team obstacles; determining deliverables the team will create, proper management involvement, etc. Coaching is especially useful in organizations where PMs are created "overnight," for instance, by designating a capable technical lead to take on a PM role with no or little prior management training
- 5.2 Your project organization can set up a coaching program to make sure project managers get hands-on practical support as they take on new challenges. The program can be very visible and formal, a requirement for all new PMs, or it can be informal and on an as-needed basis. In some organizations, the coaches are full-time internal consultants, part of a Project Management Office or a Project Support Group. In others, PMs that are more senior allocate some of their time to coach, spending the rest managing projects themselves.
- 5.3 This document provides guidelines for how a coaching relationship can work—how often the PM and coach meet, what subjects are covered, what expert advice and oversight the coach can provide. It discusses
- a) Possible levels of coaching depending upon PM skills and experience
 - b) Typical coaching involvement during a project
 - c) How to get the coaching started
 - d) Subjects to cover in a one-on-one coaching meeting
 - e) Coach's checklist items for helping keep a project on track
 - f) Project Summary Sheet for Use during PM Coaching.

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6.0 ASSOCIATED DOCUMENTS:

6.1 Project Manager Coaching Guidelines

6.2 Project Manager Coaching Template

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Project Manager Coaching Guidelines	Electronic Folder	3 years	Discard as Desired	Password Protected Folder
Project Manager Coaching Template	Electronic Folder	3 years	Discard as Desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
11/3/19		Initial Release

***** End of procedure *****

TACTICAL PLAN WORK INSTRUCTION
(CAO – W001)

Academic Office

1.0 SCOPE:

- 1.1. This instruction describes how to complete the Tactical Plan Template.

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

2.0 RESPONSIBILITY:

- 2.1. Academic Office Operations Coordinator
2.2. Academics Directors
2.3. Deputy Superintendent for Academics

3.0 APPROVAL AUTHORITY:

Signature

Date

- 3.1. Deputy Superintendent for Academics

4.0 DEFINITIONS:

- 4.1. N/A

5.0 PROCEDURE:

- 5.1. Complete the following sections of the Tactical Plan
- 5.1.1. Section: Connection to TP3.0 / District Priorities / Academic Priorities
 - 5.1.1.1. *Identify a Pillar; SMART Goal; District Priorities; Academic Priorities*
 - 5.1.2. Section: Description
 - 5.1.2.1. *Describe the elements of the program that would be impacted by the “Targeted” Pillar; SMART Goal; District Priorities, Academic Priorities:*
 - 5.1.3. Section: Strategy to accomplish your Target” (Pillar; SMART Goal; District Priorities, Academic Priorities)
 - 5.1.3.1. *Describe the Strategy (The approach you take to achieve your “Target”):*
 - 5.1.4. Section: Strategy Sponsor/Owner(s)
 - 5.1.4.1. *List the Sponsor / owner*
 - 5.1.5. Section: Impact Group(s)
 - 5.1.5.1. *List the Stakeholders, i.e., students, parents, community members, administrators*
 - 5.1.6. Section: Key Performance Indicators
 - 5.1.6.1. *Provide measurements (qualitative or quantitative) that demonstrates how effectively you are progressing towards achieving your “Target”:*

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5.1.7. Section: Key Action Steps

5.1.7.1. *Provide a coherent set of specific steps that must be taken to reach achieve your “Target”:*

5.1.8. Section: Budget

5.1.8.1. *List an estimated budget*

6.0 ASSOCIATED DOCUMENTS:

6.1. Tactical Plan Template

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Tactical Plan Template	Electronic Folder	3 years	Discard as Desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
12/3/21		Initial Release

PROFESSIONAL LEARNING REQUEST WORK INSTRUCTION
(CAO – W002)
Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the process that is used for Staff to request approval to attend a Professional Learning Opportunity

2.0 RESPONSIBILITY:

- 2.1 Academic Office Directors
2.2 Academic Office / Divisional Staff

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

Signature

Date

- 3.1 Deputy Superintendent for Academics

4.0 DEFINITIONS:

- 4.1 N/A

5.0 PROCEDURE:

- 5.1 Staff Member identifies a need for Professional Development
- 5.2 The staff member will fill out the following sections of the Professional Learning Request Form
- a) Question to Ponder
 - b) Name
 - c) School / Department
 - d) Position/Job Responsibility
 - 5.2.d.1 Conference title, location, date and description
 - e) Which TP 3.0 Pillar does this professional learning opportunity support?
 - f) Which specific school scorecard goal or district priority goal(s) does this align to within the identified Pillar?
 - g) How does this learning translate to teaching and learning? Describe the expected Evidence of Impact
 - h) How will you share this learning with your peers/building leaders?
 - i) What is your expected timeline for sharing this learning opportunity through the format designated in #8
- 5.3 Once the Staff member completes the Form, please submit the completed Form to the Academics Operations Coordinator

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- 5.3.a.1 If this Professional Learning Opportunity include Travel, please submit the completed Form with your Request for Travel Paperwork
- 5.4 The Academics Operations Coordinator submit the paperwork to the Director for Professional Development for Approval Signature.
- a) Approved Document is forwarded to the Academics Operations Coordinator
- 5.5 The Academics Operations Coordinator submit the paperwork to the Deputy Superintendent for Academics / CAO for Approval Signature.
- 5.6 One the Request is approved, the original is sent to the submitter.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 CAO AD014 Professional Learning Request.form-FINAL-2021

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Learning Request	Electronic Folder	3 years	Discard as Desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
11/10/19		Initial Release
12/5/21	A	Changes to Section 5

***** End of procedure *****

**PREPARING VOUCHERS FOR PAYMENT WORK INSTRUCTION
(CAO – W003)**

Academic Office

1.0 SCOPE:

- 1.1 This Work instruction discusses the tasks that are used to create and process Vouchers for Payment submitted to the Academic Office

2.0 RESPONSIBILITY:

- 2.1 Academic Office Directors
2.2 Academic Office / Divisional Staff

3.0 APPROVAL AUTHORITY:

- 3.1 Deputy Superintendent of Academics

Signature

Date

4.0 DEFINITIONS:

- 4.1 n/a

5.0 PROCEDURE:

- 5.1 Go the www.slps.org Finance Home page, download and read the following documents:

- a) Voucher Procedures
- b) Voucher Payment Request
- c) Fiscal Control Presentation, 07/2019

5.1.c.1 Read slides 3 through 6

- 5.2 Read the Voucher Procedures Document and determine if the Expenditure is approved for payment by Voucher.

- 5.3 **If the Voucher Request is an Non Encumbered Payment Reimbursement:**

- a) **Check your Budget for available funds**
- b) Complete the Voucher Payment Request Form

5.3.b.1 Total \$

5.3.b.2 Location Code

5.3.b.3 Vendor Code

5.3.b.4 Location Name

5.3.b.5 Vendor Name

- 5.3.b.6 Fund
- 5.3.b.7 Function
- 5.3.b.8 Object
- 5.3.b.9 Location
- 5.3.b.10 Project
- 5.3.b.11 Year
- 5.3.b.12 Amount
- 5.3.b.13 Invoice Number
- 5.3.b.14 Other Details
- c) Attach Documentation to verify method of payment
 - 5.3.c.1 Legible scanned invoice or receipt copy
 - 5.3.c.1.1.1 Total dollar amount should not exceed \$200.00
 - 5.3.c.1.1.1.1 Food items are an exception
 - 5.3.c.1.1.1.2 Attach completed participants sign-in sheet
 - 5.3.c.1.1.1.3 Attach Meeting Agenda
 - 5.3.c.2 GL_55000_SLPS: General Budget to Actual with encumbrances Report (Budget Availability)
 - 5.3.c.2.1 For instructions on how to generate the Budget Availability Report Go the www.slps.org Finance Home page and download the following document
 - 5.3.c.2.1.1 BusinessPlus Finance Training Manual FY20
 - 5.3.c.2.1.2 Read Pages 50 – 51
 - 5.3.c.3 Check Copy or bank statement (if applicable)
 - 5.3.c.4 Or Credit Copy with the last four digits visible (if applicable)
- 5.4 Submit the Completed Voucher Payment Request Form with all applicable documentation attached to the Academics Operations Coordinator, and **GOTO 5.7; OR**
- 5.5 **If you are submitting a Travel Voucher**
 - 5.5.a.1 Go the www.slps.org Finance Home page and download the Voucher Payment Request Form (if a payment is requested)
 - 5.5.a.1.1 Complete a Voucher Payment Request Form
 - 5.5.a.1.1.1 Repeat Steps 5.3.1.1 through 5.3.14
 - 5.5.a.1.2 Attach the GL_55000_SLPS: General Budget to Actual with encumbrances Report (Budget Availability)

5.5.a.1.2.1 BusinessPlus Finance Training Manual FY20

5.5.a.1.2.2 Read Pages 50 – 51

5.5.a.2 Go the WWW.SLPS.ORG Finance Home page and download the Expense Report (Actual / Advanced) blank template

5.5.a.2.1 Complete a Expense Report (Actual / Advanced)

5.5.a.2.1.1 Submission Date

5.5.a.2.1.2 Program, Project, Department

5.5.a.2.1.3 Organization Holding Meeting

5.5.a.2.1.4 Meeting Location

5.5.a.2.1.5 Inclusive Dates

5.5.a.2.1.6 Number of Days

5.5.a.2.1.7 Attendees

5.5.a.2.1.8 Job Title/Position

5.5.a.2.1.9 Account

5.5.a.2.1.10 Cost Estimate

5.5.a.2.1.11 Number of substitute teachers needed

5.5.a.2.1.12 Charge to

5.5.a.2.1.13 Submitted By

5.5.a.3 Go the WWW.SLPS.ORG Finance Home page and download the Advance Travel Request Form

5.5.a.3.1 Complete the Advance Travel Request Form blank template

5.5.a.3.1.1 Name

5.5.a.3.1.2 Department

5.5.a.3.1.3 To

5.5.a.3.1.4 From

5.5.a.3.1.5 Automobile, Train Bus, Dates and Cost

5.5.a.3.1.6 Meals, Dates and Cost

5.5.a.3.1.7 Hotels, Dates and Cost

5.5.a.3.1.8 Taxi, Shuttle, Dates and Cost

5.5.a.3.1.9 Registration, Dates and Cost

5.5.a.3.1.10 Telephone, Dates and Cost

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5.5.a.3.1.11 Other, Dates and Cost

5.5.a.3.1.12 Automobile Expense

5.5.a.3.1.12.1 Dates

5.5.a.3.1.12.2 Form (Address)

5.5.a.3.1.12.3 To (Address)

5.5.a.3.1.12.4 Miles

5.5.a.3.1.12.5 Mileage Rate

5.5.a.3.1.12.6 Parking and Tolls

5.5.a.3.1.12.7 Fund Function Location Project Year

b) Attach Hotel Reservation / Confirmation

c) Attach Documentation of Conference

d) Attach Registration

5.6 Submit the Completed Voucher Payment Request Form and applicable documentation to the Academics Operations Coordinator for Quality Checking

5.7 After completion of the Quality Check the Documents are given to the Deputy Superintendent of Academics for Approval Signature

5.8 After the Approval Signature is received, the documents are given to the Academics Operations Coordinator

5.9 The original Voucher Payment Request Form and Documentation is walked to Accounts Payable for Processing

6.0 ASSOCIATED DOCUMENTS:

6.1 Voucher Procedures

6.2 Voucher Payment Request

6.3 Leadership Presentation

6.4 GL_55000_SLPS: General Budget to Actual with encumbrances Report (Budget Availability)

6.5 BusinessPlus Finance Training Manual FY20

6.6 Expense Report (Actual / Advanced)

6.7 Authorization for Travel and Expense (IN – 90)

6.8 Advance Travel Request Form

7.0 RECORD RETENTION TABLE:

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<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
As per SLPS A/P Directives	As per SLPS A/P Directives	As per SLPS A/P Directives	As per SLPS A/P Directives	As per SLPS A/P Directives

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
10/23/19		Initial Release
1/20/22	A	Changes to Sections 2.0, 3.0, and 5.0
3/3/23	B	Changes to Sections 5.1, 5.3, and 8.0

***** End of procedure *****

**PREPARING MILEAGE REIMBURSEMENT REQUEST FOR PAYMENT
(CAO – W004)**

Academic Office

1.0 SCOPE:

- 1.1 This Work instruction discusses the tasks that are used to create and process Mileage Reimbursement Requests submitted to the Academic Office

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

2.0 RESPONSIBILITY:

- 2.1 Academic Office Directors
2.2 Academic Office Staff
2.3 Academics Operations Coordinator

3.0 APPROVAL AUTHORITY:

Signature

Date

- 3.1 Deputy Superintendent of Academics

4.0 DEFINITIONS:

- 4.1 N/A

5.0 PROCEDURE:

- 5.1 Go the www.slps.org Finance Home page, download and read the following documents:

- a) Mileage Reimbursement Request
b) Leadership Presentation, 07.17.2018
 5.1.b.1 Read slide 8
c) Read the Mileage Reimbursement Overview Slide within Leadership Presentation, 07.17.2018 Document
d) Read the first page of the Mileage Reimbursement Form

- 5.2 If the Mileage Request is eligible for Reimbursement:

- a) Complete the Mileage Reimbursement Form
 5.2.a.1 For the Month of
 5.2.a.2 Employee
 5.2.a.3 Date
 5.2.a.4 Department
 5.2.a.5 Social Security

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5.2.a.6 Fund

5.2.a.7 Location

5.2.a.8 Personnel #

5.2.a.9 Date

5.2.a.10 From

5.2.a.11 To

5.2.a.12 Total Miles

5.2.a.13 Employee Signature

5.2.a.14 Date

5.3 Validate the Budget Availability for paying the Reimbursement

5.3.a.1 Attach the GL_55000_SLPS: General Budget to Actual with encumbrances Report (Budget Availability)

5.3.a.1.1 For instructions on how to generate the Budget Availability Report Go the www.slps.org Finance Home page and download the following document

5.3.a.1.1.1 BusinessPlus Finance Training Manual FY20

5.3.a.1.1.2 Read Pages 50 – 51

5.4 Submit the Completed Original Mileage Reimbursement Form with the Original Employee Signature and Budget Availability Report to the Operations Coordinator for Academics

5.5 Quality Check of Mileage Reimbursement Form and Supporting Documents

5.6 After completion of the Quality Check the Documents are given to the Deputy Superintendent of Academics for Approval Signature

a) After the Approval Signature is received the documents is given to the Academics Operations Coordinator

5.7 The original Mileage Reimbursement and Budget Availability Report is walked to Accounts Payable for Processing

6.0 ASSOCIATED DOCUMENTS:

6.1 Mileage Reimbursement Form

6.2 Leadership Presentation

6.3 GL_55000_SLPS: General Budget to Actual with encumbrances Report (Budget Availability)

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Mileage Request	Electronic Folder	3 years	Discard as Desired	Electronic Folder

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Budget Report	Electronic Folder	3 years	Discard as Desired	Electronic Folder
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8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
10/23/19		Initial Release
1/17/22	A	Changes to Section 2

***** End of procedure *****

**PREPARING EXTRA SERVICE PROCESSING WORK INSTRUCTION
(CAO – W005)**

Academic Office

1.0 SCOPE:

- 1.1 This Work instruction discusses the tasks that are used to create and process Vouchers for Payment submitted to the Academic Office

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

2.0 RESPONSIBILITY:

- 2.1 Academic Office Directors
2.2 Academic Office Staff
2.3 Academics Operations Coordinator

3.0 APPROVAL AUTHORITY:

- 3.1 Deputy Superintendent for Academics

Signature

Date

4.0 DEFINITIONS:

- 4.1 n/a

5.0 PROCEDURE:

- 5.1 Go the www.slps.org Finance Management Office Home page, download and read the following documents:

- a) Extra Service PowerPoint Presentation
- b) Extra Service Process
- c) Fiscal Year 2022 Extra Service Spreadsheet
- d) Fiscal Year 2022 Extra Service Agreements

- 5.2 **Complete the Extra Service Agreement:**

- a) Employee Personnel Number
- b) Employee Number
- c) Employee Job Title
- d) Extra Service / Stipend Duties
- e) Extra Service / Stipend Beginning Dates
- f) Extra Service / Stipend End Dates
- g) Extra Service / Stipend Amount

- h) Extra Service / Stipend Hours
- i) Total Compensation
- j) Extra Service / Stipend Benefits Amount
- k) Total Costs
- l) Funding Account from BusinessPlus
- m) Payment Frequency
- n) Extra Service / Stipend Recipient Signature
- o) Principal / Program Administrator Signature
- p) Deputy Superintendent / Superintendent Signature

5.3 Complete the Extra Service Spreadsheet:

- a) Name
- b) Pers. No
- c) Activity Type

5.3.c.1 Text

- d) From
- e) To
- f) Pay Rate
- g) # of Hours
- h) Fund
- i) Internal Order
- j) Cost Center
- k) Grant Number

5.3.k.1.1 For instructions on how to identify SAP Fund, Internal Order, and Cost Center,
Go the www.slps.org Finance Home page and download the following document

5.3.k.1.1.1 BusinessPlus Finance Training Manual FY20

5.3.k.1.1.1.1 Read Pages 6 – 8

- l) Approved

5.3.l.1 Flag

5.3.l.2 By

5.3.l.3 Date

- m) Comments

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- 5.4 **Submit the Completed documentation to the Academics Operations Coordinator for Quality Checking**
- 5.5 After completion of the Quality Check the Documents are given to the Deputy Superintendent for Academics for Approval Signature
- 5.6 After the Approval Signature is received the documents are given to the Academics Operations Coordinator
- 5.7 The Documentation is walked to Accounts Payable for Fiscal Management Office for Processing
- 5.8 The applicable Academics Office Directors emails the FinMgmtOfc@slps.org for processing
- 5.9 Financial Management Office processes the paperwork, and forwards the paperwork to the Payroll Office
- 5.10 Payroll Office processes the paperwork and uploads it into KRONOS
- 5.11 The applicable Department's Timekeeper enters the Employees time into KRONOS

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Extra Service PowerPoint Presentation
- 6.2 Extra Service Process
- 6.3 Fiscal Year 2022 Extra Service Spreadsheet
- 6.4 Fiscal Year 2022 Extra Service Agreements
- 6.5 BusinessPlus Finance Training Manual FY20

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Extra Service Spreadsheet	Electronic Folder	3 years	Discard as Desired	Password Protected Folder
Extra Service Agreements	Electronic Folder	3 years	Discard as Desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
10/23/19		Initial Release
1/17/22	A	Changes to Sections 2.0, 3.0, and 5.0
1/10.23	b	Changes to Sections 5.0

***** End of procedure *****

PREPARING A MEMORANDUM OF UNDERSTANDING FOR PROCESSING WORK INSTRUCTION (CAO – W006)

1.0 SCOPE:

- 1.1 This Work instruction identifies the Procedure and content needed to prepare and process a Memorandum of Understanding for within the Academic Office

2.0 RESPONSIBILITY:

- 2.1 SLPS Partners
- 2.2 Stakeholders
- 2.3 Teachers
- 2.4 Principals
- 2.5 Academic Office Directors
- 2.6 Academic Office Staff

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

Signature _____

Date _____

- 3.1 Deputy Superintendent for Academics

4.0 DEFINITIONS:

- 4.1 MOU – Memorandum for Understanding
- 4.2 Dept. – Department

5.0 PROCEDURE:

- 5.1 Academic Office Directors are to forward proposed Memorandums of Understanding to the Academic Operations Coordinator for Quality Check / Review
 - a) Academic Operations Coordinator will validate that a Board Resolution was submitted for the proposed resolution
 - b) Academic Operations Coordinator will review and quality check the content of the sections of the MOU
 - c) Academics Operations Coordinator will email the successful Quality Checked MOU to the Partner for signature
 - d) The Partner will send the signed MOU for the Academics Operations Coordinator
 - e) Academics Operations Coordinator will forward the signed MOU to Procurement in support of securing the Supt. signature
 - f) Procurement will send copies the fully executed MOU, to the Partner, and the Academics Coordinator
- 5.2 The Partner can start the partnership with the applicable Dept. or School

6.0 Purpose of the MOU and Sections of the MOU

6.1 Section: Purpose of the MOU

6.1.a.1 The statement of purpose should describe the agency that are entering into the partnership, and the purpose of the partnership This statement may already exist within your on-going partnership, or it may need to be developed jointly to assist in defining the primary purpose of your agreement.

b) Section 5: Obligations of SLPS; consider the following topics to address:

6.1.b.1 **Physical Space:** Will your school be able to provide appropriate space and agreed upon resources for program activities on school premises? If yes, be specific on what your school will provide.

6.1.b.2 **Access to Students:** Will your school be able to provide regular appropriate access to children who wish to participate in the expressed services at a time mutually determined by the organization's staff and school staff? Be specific on how your school will manage this.

6.1.b.3 **Communication:** Will your school be able to maintain regular and consistent communication with the agency? Be specific on what structure will be put in place to stay in communication.

6.1.b.4 **Anything Else:** List any other support that your school will provide (supplies, food, data sharing, inclusion in staff meetings or school events, etc.)

c) Section 6: Obligations of the Agency; consider the following topics to address:

6.1.c.1 **Specific Services:** Include a listing of the specific services that will be provided to make sure they align with your school's needs, and with the District's Transformation Plan.

6.1.c.2 **Progress Reports:** Increase an agreed upon schedule of checking in on progress towards outcomes in the middle of the school year, and at the end of the school year.

6.1.c.3 **Communication:** Include details on how the agency will maintain regular and consistent communication with school. This will likely be similar to what is listed in the previous section, but may have additional responsibilities for the agency,

6.1.c.4 **Anything Else:** List any other support that the agency will provide (supplies, food, inclusion in community events, etc.)

d) Section 7: Performance Standards; consider the following topics to address:

6.1.d.1 This section will set the goals that the partnership is working towards, and by which the partnership will be evaluated at the end of the year. It may help for you to evaluate an agencies performance in three categories:

6.1.d.2 **Transformation Plan Alignment:** To what extent does the agency's services specifically align with the Transformation Plan?

6.1.d.3 **Quantitative Indicators of Effective Program Implementation:** Identify several target goals for measurable outputs (e.g. # of sessions) and outcomes (e.g. improvement of student performance in a specific rea like STAR reading scores of disciplinary incidents). Include the type of information that will be used to measure success, and targeted results (e.g. 10 sessions, or 15% increase on STAR reading scores)

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6.1.d.4 **Qualitative Indicators of a High Quality Partnerships:** Below are some indicators of an effective partnership; you may want include reference to these indicators so that you can incorporate these factors when evaluating the partnership at the end of the year.

6.1.d.5 Table of Quality Indicators and Criteria for Success

QUALITY INDICATORS	CRITERIA FOR SUCCESS
Strength of Self Evaluation Measures	<ul style="list-style-type: none"> Measurement tool uses evidence – based protocols that promote continuous improvement Measurement tool tightly aligns to partnership goals and strategic action plan Measurement tool engages partnership members in regularly assessing their own progress
Strength of Information Dissemination / Partnership Communication	<ul style="list-style-type: none"> Communication mechanisms exist for regularly dissemination relevant news and progress updates in a timely manner.
Strength of Relationships with students and / or school staff	<ul style="list-style-type: none"> School staff see the partnership as providing important support for students / school culture School staff will make accommodations to ensure partnership continues Schools look forward to / see value in engaging with partners
Partner Adaptability	<ul style="list-style-type: none"> Both partners demonstrate willingness to accommodate the needs of the partnership Both partners articulate needs in a constructive manner

e) **Section 9 Term and Termination :** Provide the start and end dates for this MOU

7.0 ASSOCIATED DOCUMENTS:

7.1 SLPS MOU Template

8.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
SLPS MOU	Electronic Folder	3 years	Discard as Desired	Password Protected Folder

9.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
2/28/20		Initial Release
1/20/22	A	Changes to 2.0, 3.0, and 4.0
2/8/23	B	Changes to 2.0 through 11.0

* * * E n d o f p r o c e d u r e * * *

**CURRICULUM DEVELOPMENT PROCEDURE
(CUR-P002)**

Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the process that is used for Curriculum Development within Saint Louis Public Schools.

2.0 RESPONSIBILITY:

- 2.1 Curriculum & Instruction Specialists
2.2 Principals
2.3 Teachers
2.4 Director of Curriculum & Instruction

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

Signature

Date

3.0 APPROVAL AUTHORITY:

- 3.1 Deputy Superintendent for Academics / CAO

4.0 DEFINITIONS:

- 4.1 SLPS – St. Louis Public Schools
4.2 Academic Standards – what a student should know and be able to do a specific grade level
4.3 Assessment – a valid and reliable measurement of student performance on a set of academic standards
4.4 Curriculum – a series of planned instruction that is coordinated, articulated and implemented in a manner designed to result in the achievement at the proficient level of all students
4.5 Planned Instruction – Instruction offered by SLPS based upon a written plan to enable students to achieve academic standards.

5.0 PROCEDURE:

- 5.1 The need for new or revised curricula are typically the result of one or more of the following activities
- a) State regulations, new state standards for curriculum, and / or alignment with state standards and national standards
 - b) Textbook adoptions
 - c) State Assessment testing results
 - d) School Board requests
- 5.2 The District curriculum cycle will define the timeline for the curriculum development process, The Deputy Superintendent for Academics / CAO may modify the curriculum cycle, if needed
- 5.3 The Deputy Superintendent for Academics / CAO and Principals will identify department chairpersons and Curriculum Specialists who will do the actual writing of planned instruction /

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also known as curriculum, and establish the requirements for writing curriculum to be followed during the process

- 5.4 The SLPS format for developing the curriculum is introduced and explained to the department chairpersons, and curriculum specialists by the Deputy Superintendent for Academics / CAO, or designee
- 5.5 Individuals who are involved with the development of the curriculum will take the following steps
- Review the District's format and current plan
 - Review the state and national standards and identify strengths and weaknesses in the current curriculum
 - Research priority standards and instructional practices for inclusion into the plan of instruction
 - Identify the essential learning targets that will be achieved through the plan of instruction
 - Identify relevant resources that will be used with the curriculum and connected to assessed Standards
 - Meet with the Deputy Superintendent for Academics / CAO, as needed, to discuss the program status and determine any need for modifications to curriculum plan
- 5.6 The Deputy Superintendent for Academics / CAO will approve suggested changes to the curriculum
- 5.7 Once the curriculum has been used for six years, the Teachers, Curriculum Specialists, and Director review it, for Curriculum, and The Deputy Superintendent for Academics / CAO.
- New Course Curriculum – During the first year of implementation, each semester, the course teachers review the strengths and weaknesses of the curriculum with Curriculum Specialists, Director for Curriculum and The Deputy Superintendent for Academics / CAO. If changes are required, appropriate steps will be taken to revise the curriculum
 - Updated / Revised Curriculum – after a period of one academic year, the curriculum is reviewed. The Deputy Superintendent reviews this feedback for Academics / CAO.

6.0 ASSOCIATED DOCUMENTS:

6.1

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
N/a	N/a	N/a	N/a	N/a

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
1/15/20		Initial Release

* * * E n d o f P r o c e d u r e * * *

CURRICULUM
NEW COURSE ADDITION
(CUR-P004)
Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the process that is used for requesting a new course addition to SIS and the K-12 Course Catalog

2.0 RESPONSIBILITY:

- 2.1 SLPS Principals
2.2 Network Superintendents

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

Signature

Date

- 3.1 Data Specialist
3.2 Deputy Superintendent / CAO

4.0 DEFINITIONS:

- 4.1 SLPS – St. Louis Public Schools
4.2 SIS – School Information System

5.0 PROCEDURE:

- 5.1 Principals to obtain New Course Addition Approval Form from the Quality Assurance Folder within the Academic Playbook
5.2 Principals to complete New Course Addition Approval Form for requesting a new course addition to SIS and the K-12 Course Catalog
5.3 Completed New Course Addition Approval Form to be submitted to Curriculum & Instruction for approval by the Director of Curriculum & Instruction during the months of August through November,
5.4 Curriculum & Instruction approved New Course Addition Approval Form to be submitted to the Supt, in October approval
5.5 The Approved New Course Addition will be reviewed by the Board of Education in January, and will consider for Approval Vote in February
5.6 Principals to be notified of approval status of submitted New Course Addition Approval Form
5.7 Curriculum & Instruction and SAB approved New Course Addition Approval Form to be processed by Student Data Specialist by:
a) Assigning a new course number from SIS core catalog (District Level-District Subjects)
b) Updating SIS with new course addition
c) Updating K-12 Course Catalog with new course addition
d) Uploading updated K-12 Course Catalog to Curriculum & Instruction website

6.0 ASSOCIATED DOCUMENTS:

- 6.1 New Course Addition Approval Form

ACADEMIC PROCESS MANAGEMENT PROGRAM

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
New Course Addition Approval Form	Electronic Folder	3 years	Discard as Desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date</u>	<u>Rev</u>	<u>Description of Revision:</u>
6/9/08		Initial Release
12/3/10	A	Revised 6.0 Procedure: 6.3
4/30/19	B	Revised 3.0 Responsibility: 3.2 Revised 4.0 Approval Authority: 4.2 Revised 6.0 Procedure: 6.3 Revised 8.0 Record Retention Table: Storage, Disposition, Protection Revised 9.0 Revision History: Date, Rev., Description of Revision
9/25/19	C	Revised 2.0 Responsibility: 2.2 Revised 3.0 Approval Authority: 3.1, 3.2

*** End of Procedure ***

**TEXTBOOK INVENTORY VIA DESTINY SYSTEM PROCEDURE
(CUR – P005)**

Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the process for the conducting Textbooks Inventory at the School Level using the Destiny Software System within The Saint Louis Public Schools

2.0 RESPONSIBILITY:

- 2.1 Deputy Superintendent for Academics
2.2 Curriculum Director (Academics)
2.3 Principals
2.4 Academic Instructional Coordinators
2.5 Book Clerks
2.6 Curriculum Specialists

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

- 3.1 Deputy Superintendent for Academics

Signature

Date

4.0 DEFINITIONS:

- 4.1 SLPS – Saint Louis Public Schools

5.0 PROCEDURE:

- 5.1 Deputy Superintendent of Academics and Curriculum Director conducts Textbook Ordering Process Project Team meeting in February
- 5.1.a.1 Discussion includes the timeline for school-based inventorying of textbooks
- 5.2 Either in late February or early March, the Curriculum Director emails the Inventory Memo and Process document to the Principals outlining timeline and procedure for the Textbook Inventory
- 5.3 Academic Instructional Coordinators (Elementary and Middle Schools); Book Clerks (High Schools) conduct inventory
- a) Conduct Physical count of all textbooks and consumable materials in the School Building (classrooms and storerooms)
- b) Results of Physical Count is entered into the Destiny at the School Level
- c) Inventory Completion Status will be monitored throughout the inventory window by the Curriculum Director
- d) Updated Destiny Textbooks Report is compared against upcoming school year projected enrollment by curriculum specialists
- e) Gap analysis is performed at the district level by the curriculum team

ACADEMIC PROCESS MANAGEMENT PROGRAM

5.3.e.1 Textbooks on hand exceed Projected Enrollment; Or,

5.3.e.2 Textbooks on hand is less than Projected Enrollment; Or,

5.3.e.3 Textbooks on hand equal Project Enrollment.

f) List (spreadsheet) of textbooks needed is generated at the School Building Level

5.4 Schools email Spreadsheet to Curriculum Specialists

5.5 Curriculum Specialists facilitate transfer of surplus books to meet demand, then enter Textbooks Requisitions into Business Plus

5.6 Textbooks and instructional materials will be delivered to schools in July/August in preparation for the upcoming school year

5.7 Textbook Managers at school sites will add copies to their inventory when received

6.0 ASSOCIATED DOCUMENTS:

6.1 SLPS DESTINY User Guide(s) updated annually to reflect current Destiny version

6.2 CUR-AD026 Level Library Memo

6.3 CUR-AD027 Textbook Inventory Memo

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
N/a	N/a	N/a	N/a	N/a

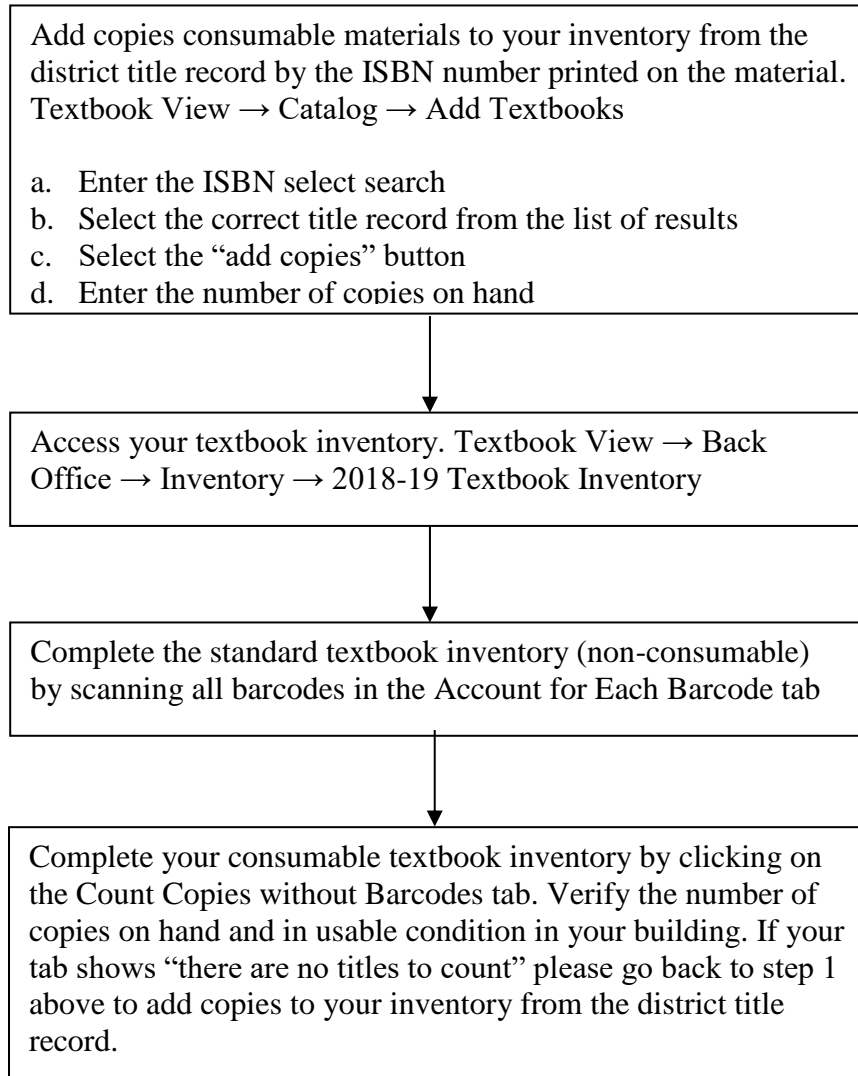
8.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Rev</u>	<u>Description of Revision</u>
6/9/08		
1/15/20	A	Revised 5.1

9.0 FLOWCHART:

9.1 Flowchart detailing this process can be found on the next page.

TEXTBOOK INVENTORY FLOWCHART



CURRICULUM COMMITTEE
(CUR-P006)
Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the process that is used for the ongoing use of the Curriculum Committee Saint Louis Public Schools.

2.0 RESPONSIBILITY:

- 2.1 Curriculum & Instruction Specialists
2.2 Principals
2.3 Teachers
2.4 Network Supts
2.5 Parents
2.6 Elected Board Members

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

Signature

Date

3.0 APPROVAL AUTHORITY:

- 3.1 Director of Curriculum & Instruction
3.2 Deputy Superintendent for Academics / CAO

4.0 DEFINITIONS:

- 4.1 SLPS – St. Louis Public Schools

5.0 PROCEDURE:

- 5.1 Determine the need for the Committee
- a) Identify Committee Members
 - b) Extend Invitation to Potential Members
 - c) Process Acceptance Responses
 - d) Confirm Committee Members
- 5.2 Establish First Monthly Meeting Date/Time/Location
- 5.3 Conduct Meeting
- a) Establish Future Monthly Meeting Dates
 - b) Identify and discuss adjustments to
 - 5.3.b.1 curriculum development, and
 - 5.3.b.2 instructional practices,

ACADEMIC PROCESS MANAGEMENT PROGRAM

- 5.4 Provide report that address learning expectations so that they evolve with research and futuristic outcomes to close the achievement gap and meet the broad range of our students' learning needs and aspirations.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Committee Member invitation Letter
6.2 Meeting Schedule

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Meeting Notes	Electronic Folder	3 years	Discard as Desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
5/3/19		Initial Release

***** End of Procedure *****

CURRICULUM WORKGROUP
(CUR-P007)
Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the process that is used for the ongoing use of the Curriculum Workgroup Saint Louis Public Schools.

2.0 RESPONSIBILITY:

- 2.1 Curriculum & Instruction Specialists
2.2 Principals
2.3 Teachers
2.4 Elected Board Members

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

Signature

Date

3.0 APPROVAL AUTHORITY:

- 3.1 Deputy Superintendent for Academics / CAO

4.0 DEFINITIONS:

- 4.1 SLPS – St. Louis Public Schools

5.0 PROCEDURE:

- 5.1 Determine the need for the Workgroup
- a) Identify Workgroup Members
 - b) Extend Invitation to Potential Members
 - c) Process Acceptance Responses
 - d) Confirm Workgroup Members
- 5.2 Meetings are scheduled on a monthly basis
- 5.3 Conduct Meeting
- a) Members discuss the following:
 - 5.3.a.1 New Initiatives and Proposed Initiatives within Academics
 - 5.3.a.2 Solicit Feedback from members regarding all Initiatives,
- 5.4 Provide report that list, describe, and status of all initiatives.
- a) The report will include the assimilation of member's feedback regarding all initiatives.
 - b) The report will provide roadmaps for implementing and sustaining all Academic related Initiatives.

6.0 ASSOCIATED DOCUMENTS:

ACADEMIC PROCESS MANAGEMENT PROGRAM

6.1 Workgroup Member invitation Letter

6.2 Meeting Schedule

6.3 Monthly workgroup Reports

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Meeting Notes	Electronic Folder	3 years	Discard as Desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
5/7/19		Initial Release

***** End of Procedure *****

NEW ADOPTION COMMITTEE
(CUR-P008)
Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the process that is used for the ongoing use of the Textbooks New Adoption Committee of Saint Louis Public Schools.

2.0 RESPONSIBILITY:

- 2.1 Curriculum & Instruction Specialists
2.2 Principals
2.3 Teachers
2.4 Parents
2.5 Students
2.6 Community Members
2.7 Elected Board Members

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

Signature

Date

3.0 APPROVAL AUTHORITY:

- 3.1 Deputy Superintendent for Academics / CAO

4.0 DEFINITIONS:

- 4.1 SLPS – St. Louis Public Schools
4.2 CUR - Curriculum

5.0 PROCEDURE:

- 5.1 New Adoption Textbook Cycle is every 5 years by content area
- a) Identify Committee Members by content area
 - b) Extend Invitation to Potential Members
 - c) Process Acceptance Responses
 - d) Confirm Committee Members
- 5.2 Conduct Committee Members Orientation Meeting
- 5.3 The New Adoption Process and Committee Members responsibilities are governed by the following District Procedure
- a) CUR-P001 Adoption of Instructional Materials Procedures

6.0 ASSOCIATED DOCUMENTS:

ACADEMIC PROCESS MANAGEMENT PROGRAM

6.1 Curriculum Procedures

6.2 Curriculum Associated Documents

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Meeting Notes	Electronic Folder	3 years	Discard as Desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
5/3/19		Initial Release

***** End of Procedure *****

**TEXTBOOKS FALL INVENTORY PROCEDURE
(CUR-P009)**

Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the process that is used for Conducting a First Semester Inventory in December by the Central Office Staff.

2.0 RESPONSIBILITY:

- 2.1 Curriculum & Instruction Specialists
2.2 Operations Coordinator for the Academic Office

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

Signature

Date

- 3.1 Deputy Superintendent for Academics / CAO

4.0 DEFINITIONS:

- 4.1 SLPS – St. Louis Public Schools
4.2 CUR - Curriculum

5.0 PROCEDURE:

- 5.1 Curriculum Specialists will conduct this preliminary inventory every Fall during the Month of December
- 5.2 For the Month of December, Judine Keplar, English Language Arts Curriculum Specialist, Grades 6-12, will provide training to all Curriculum Specialists
- 5.3 Each Curriculum Specialist will generate a report based on their Content Area.
- a) Curriculum Specialists will log on to Destiny
 - b) Select “District”
 - c) Select “Textbook View”
 - d) Select “Reports”
 - e) Select “Textbook Reports”
 - f) Select “Title & Copy List
 - g) Enter Name of School and other Search Parameters
 - h) Select “Run Report”

- 5.4 When the Report is completed, Click on “View” to generate Report

6.0 ASSOCIATED DOCUMENTS:

- 6.1 CUR AD024 Textbook Inventory Reports Tutorial With Screenshots

ACADEMIC PROCESS MANAGEMENT PROGRAM

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Reports	Electronic Folder	3 years	Discard as Desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
11/10/19		
11/14/19	A	5.2 and 5.3

*** * * E n d o f P r o c e d u r e * * ***

**ECE / ECSE MARKETING RECRUITMENT PLAN PROCEDURE
(ECE-P001)**

Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the process for the Developing and Implementing the ECE / ECSE Marketing Recruitment Plan for in Saint Louis Public Schools

2.0 RESPONSIBILITY:

- 2.1 Assistant Superintendent for ECE/ ECSE
2.2 ECE / ECSE Staff
2.3 Institutional Advancement Staff
2.4 Recruitment and Counseling Staff

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

- 3.1 Assistant Superintendent for ECE/ ECSE

Signature

Date

4.0 DEFINITIONS:

- 4.1 SLPS – Saint Louis Public Schools
4.2 ECE – Early Childhood Education
4.3 ECSE – Early Childhood Special Education
4.4 ITR – Intent to Return

5.0 PROCEDURE:

5.1 ESTABLISH TIMELINES (October – November)

- a) Meet with Institutional Advancement, Recruitment & Counseling
5.1.a.1 Discuss marketing and recruitment plans including marketing timelines, mass enrollment events, open house activities website updates and online sign-up and other methods for registering
b) Discuss development of marketing materials
c) Meet with school principals to share revised process
d) Finalize marketing materials

5.2 PREPARE MATERIALS (December - January)

- a) Prepare reminder letter to families outside neighborhood boundaries regarding returning to their neighborhood school
b) Prepare Intent to Return (ITR) and marketing materials for distribution to schools

ACADEMIC PROCESS MANAGEMENT PROGRAM

- c) Meet with principals to share timelines and provide process updates
- d) Prepare and distribute Intent to Return forms to schools
- e) Distribute information to parents about registration process
- f) Automated Phone Calls to families to alert/remind them that the ITR process has begun

5.3 IMPLEMENT MARKETING PLAN (February – March)

- a) Begin advertising mass enrollments (*1 north & 1 south*)
- b) Disseminate notifications to families that have completed the ITR process
- c) Distribute materials at all recruitment events internally/externally
- d) Meet with principals and meet with school level staff to share next steps in actual registration process
- e) Schools begin holding site based recruitment activities

5.4 REGISTRATION BEGINS (March)

- a) Schools submit completed intake (wait list) forms to ECE Office
- b) ECE Office distributes mailing to wait list families to alert about scheduling appointments
- c) ECE begins scheduling appointments based on intake forms.
- d) Advertising continues as needed with external sources

6.0 ASSOCIATED DOCUMENTS:

- 6.1 SLPS ECE / ECSE Marketing and Recruitment Plan

7.0 RECORD RETENTION TABLE:

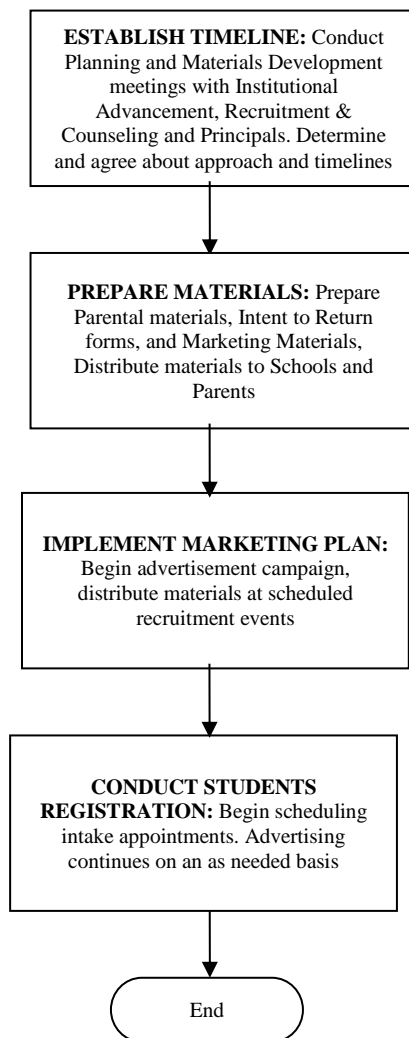
<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
N/a	N/a	N/a	N/a	N/a

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
3/16/2013		Added 6.1 – 6.6
2/21/20	A	

FLOWCHART:

9.1 Flowchart detailing this process can be found on the next page.



*** End of procedure ***

**WITHDRAWAL FROM EARLY CHILDHOOD EDUCATION
PRE – K PROGRAM PROCEDURE
(ECE-P002)**

Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the process for withdrawing students with excessive absences from the SLPS Early childhood Education Pre-K Program

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

2.0 RESPONSIBILITY:

- 2.1 Assistant Superintendent for ECE/ ECSE
2.2 Principal
2.3 Parent
2.4 Guardian
2.5 Student
2.6 Teacher
2.7 School Secretary
2.8 ECE / ECSE Clerk Typist

3.0 APPROVAL AUTHORITY:

- 3.1 Assistant Superintendent for ECE/ ECSE

Signature

Date

4.0 DEFINITIONS:

- 4.1 SLPS – Saint Louis Public Schools
4.2 ECE – Early Childhood Education
4.3 ECSE – Early Childhood Special Education

5.0 PROCEDURE:

- 5.1 Determine if Student has **three** consecutive unexcused absences or eighteen hours
a) If Yes, Go to **5.3, “Warning Letter Process”** or
- 5.2 Determine if Student has **five** consecutive unexcused absences or thirty hours
a) If Yes go to **5.6, “Withdrawal Letter Process”**
- 5.3 **Warning Letter Process**
a) Teacher will notify the Principal and Parent / Guardian of the three consecutive unexcused absences.

ACADEMIC PROCESS MANAGEMENT PROGRAM

- b) School Secretary will notify the Assistant Superintendent for ECE / ECSE of the **three** consecutive unexcused absences or eighteen hours
- c) Teacher will schedule and Principal will conduct a Parent / Guardian conference (meeting) to discuss SLPS ECE/ECSE attendance policy

5.3.c.1 Teacher and Parent will seek a way to improve the Student's attendance (e.g., Home Visits, S.I.T. Teams, Social Workers, Counselors, etc...).

- d) The expectation is, "Student Attendance will improve".

5.4 Withdrawal Letter Process

- a) Assistant Superintendent for ECE / ECSE will send Enrollment Withdrawal Letter (Five consecutive unexcused absences or Thirty hours) to Parent / Guardian.
- b) Teacher schedules and Principal conduct "withdrawal" meeting with Parent / Guardian.
- c) School Secretary withdraws Student upon approval from ECE Office.
- d) ECE / ECSE / PIIP Clerk Typist will update the Student Database in SIS.

5.4.d.1 The student will be placed at the bottom of the current waiting list.

- e) Assistant Superintendent for ECE / ECSE will contact the next family from the top of the waiting list.
- f) The Family will have a grace period of seventy-two hours to respond and accept the enrollment slot in SLPS Pre-K program.
- g) If accepted within the grace period, the Family, ECE / ECSE and School staff will conduct enrollment procedures

5.4.g.1 If not accepted within the seventy-two hours grace period, the Assistant Superintendent for ECE / ECSE will contact the next Family on the waiting list.

6.0 ASSOCIATED DOCUMENTS:

6.1 Attendance Warning Letter (three consecutive absences or eighteen hours)

6.2 Enrollment Withdrawal Letter (five consecutive absences or thirty hours)

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Attendance Warning Letter	Electronic Folder	3 years	Delete as Desired	Password Protected Folder
Enrollment Withdrawal Letter	Electronic Folder	3 years	Delete as Desired	Password Protected Folder

8.0 REVISION HISTORY:

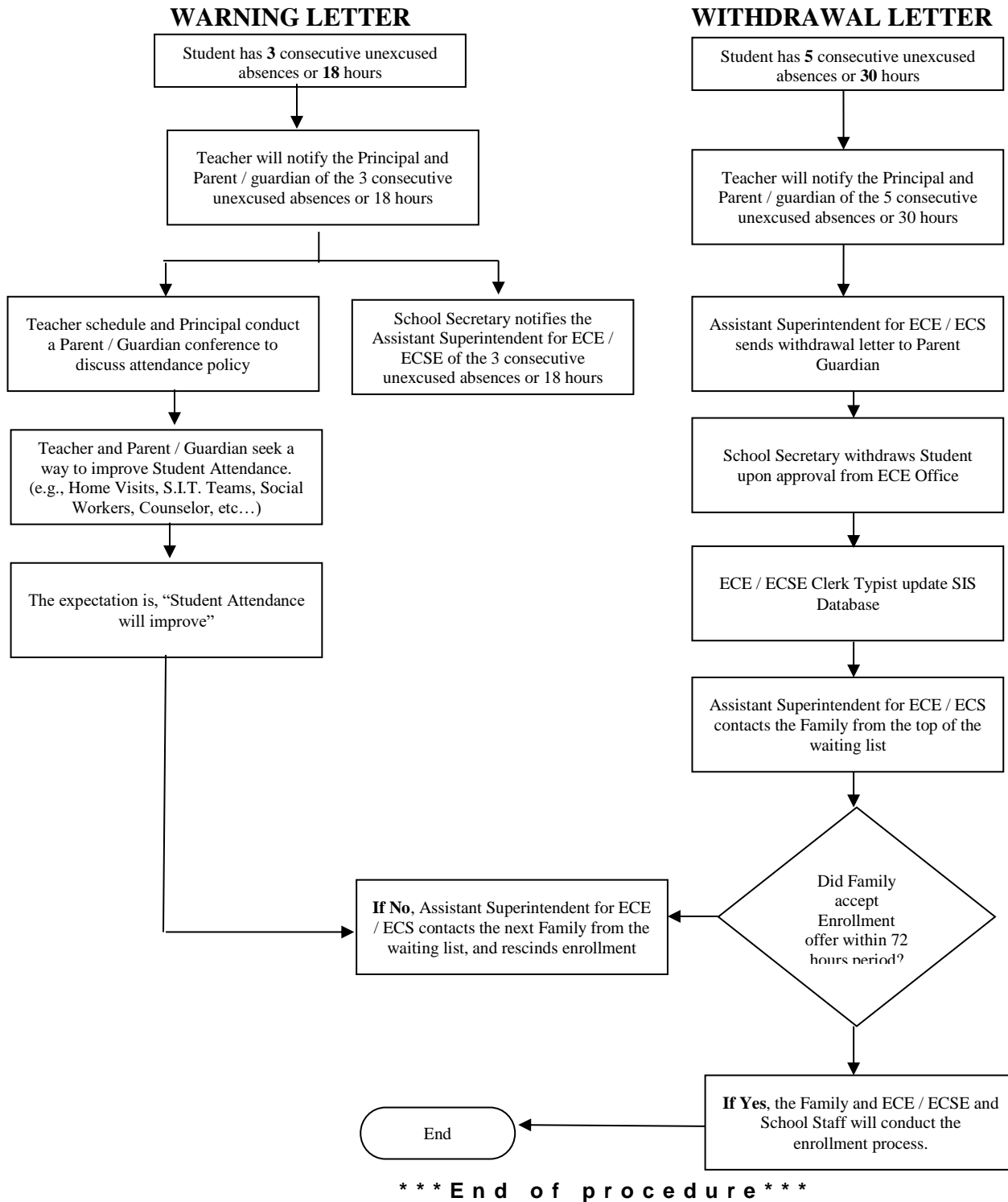
<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
3/16/13		Initial Release

ACADEMIC PROCESS MANAGEMENT PROGRAM

2/21/20	A	Added 6.1 – 6.6
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9.0 FLOWCHART:

9.1 Flowchart detailing this process can be found below:



**REGISTRATION FOR NEW EARLY CHILDHOOD EDUCATION STUDENTS
PROCEDURE
(ECE-E003)
Academic Office**

1.0 SCOPE:

- 1.1 This procedure discusses the process for the registration of new ECE Students in Saint Louis Public Schools

2.0 RESPONSIBILITY:

- 2.1 Assistant Superintendent for ECE/ ECSE
2.2 Principal
2.3 Parent
2.4 Guardian
2.5 Student
2.6 Teacher
2.7 School Secretary
2.8 ECE / ECSE Clerk Typist

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

- 3.1 Assistant Superintendent for ECE/ ECSE

Signature

Date

4.0 DEFINITIONS:

- 4.1 SLPS – Saint Louis Public Schools
4.2 ECE – Early Childhood Education
4.3 ECSE – Early Childhood Special Education

5.0 PROCEDURE:

5.1 INTAKE PROCESS

- 5.2 Parents / Guardians schedule an “intake” appointment with the ECE / ECSE staff
5.3 At intake appointment, Parents / Guardians provides copies of the required documentation to the ECE / ECSE Staff
5.4 ECE / ECSE reviews the following documentation for accuracy
a) Official Birth Certificate
b) Parent / Legal Guardian Identification
c) Proof of Residency

- d) Proof of annual Income
- e) Current Immunization Record for Student
- f) Health Insurance Card
- g) Current Physical (including Lead and hemoglobin results by child physician)
- h) Dental Form completed by Child's Dentist

5.5 REGISTRATION PROCESS

5.6 During the intake appointment, the Parents / Guardian will complete applicable SLPS ECE / ECSE forms

5.7 ECE / ECSE Staff reviews the following completed forms for accuracy

- a) New registration form
- b) Health & Nutrition Questionnaire
- c) ECE / ECSE Preschool collaboration Program form
- d) Education & work History form
- e) Family needs / Strengths Assessment form
- f) Parent Agreement form
- g) Child Care Enrollment form
- h) HIPAA release of health information
- i) Risk Assessment for TB
- j) Exchange / Release form

5.8 FILE REVIEW PROCESS

5.9 Upon successful review of all submitted and completed documentation, the ECE / ECSE Staff awards an approval letter to the Parents / Guardians

- a) Award letter is discussed with parent (especially the transportation section)
- b) The Parent / Guardian provides a copy of the approval letter to the school upon school site registration

5.10 (If needed); ECE / ECSE staff fax copies of the Approval letter, and Health and Nutrition form to the receiving school

5.11 DATA ENTRY PROCESS

5.12 ECE / ECSE Staff maintains ECE / ECSE data entry files / spreadsheets for the following data points

- a) New Gen ED Students
- b) Returning Students

ACADEMIC PROCESS MANAGEMENT PROGRAM

- c) Magnet Schools Students
- d) Special Education Students
- e) Head Start Students
- f) ELL Students

5.13 Once all ECE / ECSE Students are assigned to class within the Student Information System (SIS); the ECE / ECSE Staff will generate a daily SIS report called ROSS5

5.14 Data from the SIS5 report is uploaded into the ECE / ECSE PreK Daily Stats report.

5.15 FILE MANAGEMENT PROCESS

- a) .ECE / ECSE staff prepares
- b) Each folder is labeled

5.15.b.1 ECE / ECSE Office folder contains original documents

5.15.b.2 Completed file folders are kept in the ECE / ECSE Office

6.0 ASSOCIATED DOCUMENTS:

6.1 SLPS ECE / ECSE Students Registration Manual

7.0 RECORD RETENTION TABLE:

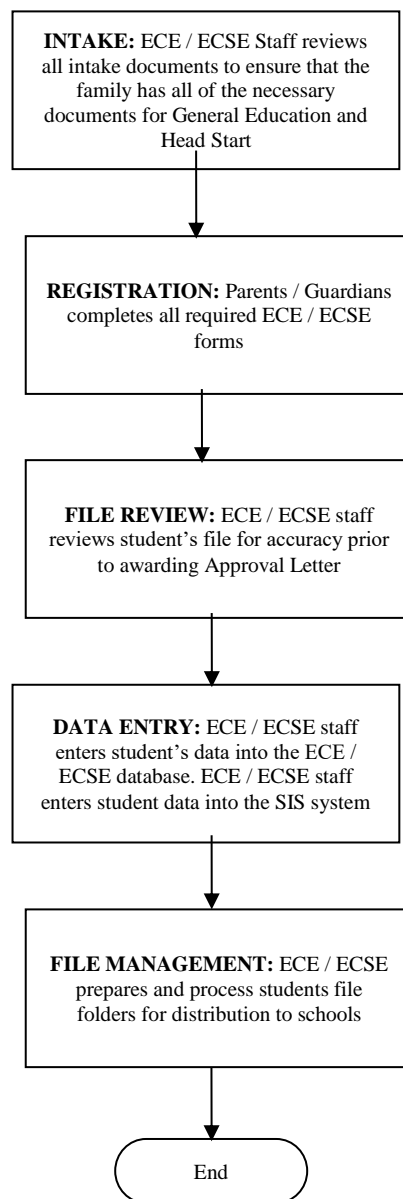
<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
N/a	N/a	N/.a	N/.a	N/a

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
3/16/13		Initial Release
2/21/20	A	Added 6.1 – 6.6

9.0 FLOWCHART:

9.1 Flowchart detailing this process can be found on the next page.



*** End of procedure ***

**REGISTRATION FOR RETURNING EARLY CHILDHOOD EDUCATION
STUDENTS PROCEDURE**

(ECE-E004)

Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the process for the registration of Returning ECE Students in Saint Louis Public Schools

2.0 RESPONSIBILITY:

- 2.1 Assistant Superintendent for ECE/ ECSE
2.2 Principal
2.3 Parent
2.4 Guardian
2.5 Student
2.6 Teacher
2.7 School Secretary
2.8 ECE / ECSE Clerk Typist

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

- 3.1 Assistant Superintendent for ECE/ ECSE

Signature

Date

4.0 DEFINITIONS:

- 4.1 SLPS – Saint Louis Public Schools
4.2 ECE – Early Childhood Education
4.3 ECSE – Early Childhood Special Education
4.4 ITR – Intent to Return

5.0 PROCEDURE:

- 5.1 During the Month of February, School Staff will assist “returning families with completing the Intent to Return Form
- 5.2 School Staff forwards Intent to Return (ITR) information to the ECE / ECSE Office
- a) ITR data is used in support of determining available seats for the upcoming school year
- 5.3 During the month of February all returning families must provide the following the documents to the school
- a) RE-Entry registration form
- b) Parent Agreement form

- c) HIPAA release of health information
 - d) Risk Assessment for TB
 - e) Birth Certificate
- 5.4 During the month of August all returning families must provide the following the documents to the school
- a) Updated Proof of residency – current unpaid utility bill
 - b) Updated Proof of Annual Income
 - 5.4.b.1 Current tax return, or;
 - 5.4.b.2 TANF Letter, or;
 - 5.4.b.3 SSI Letter / Statement, or;
 - 5.4.b.4 Current Food Stamp Summary
 - c) Any missing Health Required documents
- 5.5 **TRANSFER STUDENTS**
- a) Families that are planning to transfer their child to another school should complete a parental request form and fax it, 314-244-1705 to the EC/ECSE office. Parents must make request for transfer and indicate what school.
- 5.6 **DATA ENTRY PROCESS**
- 5.7 ECE / ECSE Staff maintains ECE / ECSE data entry files / spreadsheets for the following data points
- a) Returning Students
 - b) Magnet Schools Students
 - c) Special Education Students
 - d) Head Start Students
 - e) ELL Students
- 5.8 Once all ECE / ECSE Students are assigned to class within the Student Information System (SIS); the ECE / ECSE Staff will generate a daily SIS report called ROSS5
- 5.9 Data from the SIS5 report is uploaded into the ECE / ECSE Pre-K Daily Stats report.
- 5.10 **FILE MANAGEMENT PROCESS**
- a) .ECE / ECSE staff updates returning students file folders
 - b) Each folder is labeled
 - 5.10.b.1 ECE / ECSE Office folder contains original documents
 - 5.10.b.2 School folder contains copies of the documents
 - 5.10.b.3 Files are recorded in the database

ACADEMIC PROCESS MANAGEMENT PROGRAM

5.10.b.4 Completed file folders are kept in the ECE / ECSE Office

6.0 ASSOCIATED DOCUMENTS:

6.1 SLPS ECE / ECSE Students Registration Manual

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
N/a	N/a	N/a	N/a	N/a

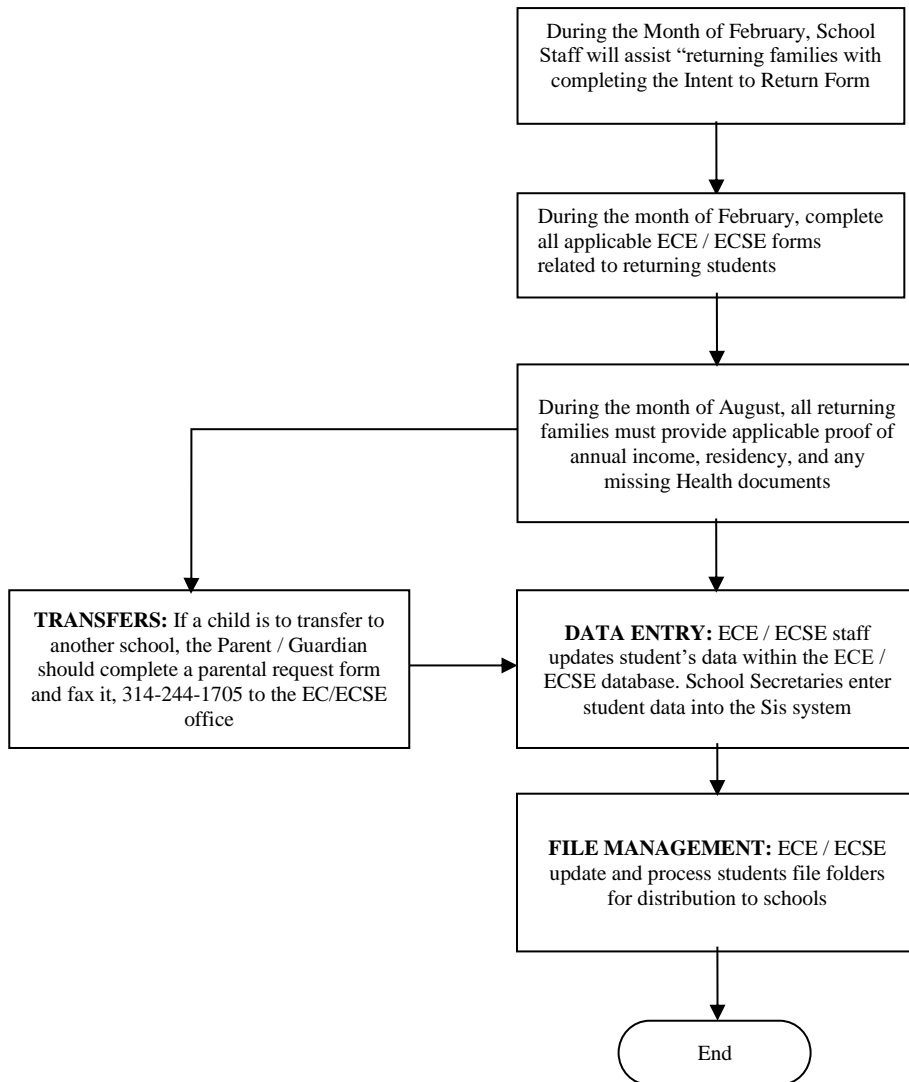
8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
3/16/13		Initial Release

9.0 FLOWCHART:

9.1 Flowchart detailing this process can be found on the next page.

ACADEMIC PROCESS MANAGEMENT PROGRAM



*** End of procedure ***

**INITIAL EVALUATION PROCESS – AGENCY REFERRAL PROCEDURE
(SPED-P001)**

Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the procedures for the Initial Evaluation Process – Agency Referral for Saint Louis Public Schools.

2.0 RESPONSIBILITY:

- 2.1 Student
2.2 Parents
2.3 Agency
2.4 Special Education Department

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

- 3.1 Director for Special Education

Signature

Date

4.0 DEFINITIONS:

- 4.1 SLPS – Saint Louis Public Schools
4.2 LEA – Local Education Agency

5.0 PROCEDURE:

- 5.1 Student Participates in pre-referral strategies and process in general education Strategies
5.2 Agency Determines if there is reason to suspect a disability
5.3 **If YES;** this is the date of referral for special education. Provide Procedural Safeguards with 5 schools days; **GOTO 5.4**
a) **If NO;** LEA continues to provide interventions within general education settings
5.4 Conduct a Review of Existing Data within 30 calendar days of referral. This starts the evaluation process
5.5 If no additional data needed – provide parents prior written notice of Action for initial Evaluation; **GOTO 5.6**
a) If Additional Data needed – provide Parents Prior written Notice of Action for initial evaluation
b) Receive written consent from parent / guardian
c) Conduct Evaluation; **GOTO 5.7**
5.6 Receive written consent from parent / guardian

ACADEMIC PROCESS MANAGEMENT PROGRAM

- 5.7 Conduct Eligibility Determination Meeting within 60 calendar days of receipt of consent for initial evaluation
- a) **For Eligible students**, develop IEP within 30 calendar days of eligibility determination; provide parent with prior written Notice of action for initial services and an Evaluation Report; **OR**
 - b) For Ineligible Students provide parent with prior written Notice of Action – ineligibility and an Evaluation Report

6.0 ASSOCIATED DOCUMENTS:

6.1

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
N/a	N/a	N/a	N/a	N/a

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
10/30/19	A	Initial Release

***** End of procedure *****

**INITIAL EVALUATION PROCESS – PARENT REFERRAL PROCEDURE
(SPED-P002)**

Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the procedures for the Initial Evaluation Process – Parent Referral for Saint Louis Public Schools.

2.0 RESPONSIBILITY:

- 2.1 Student
2.2 Parents
2.3 Special Education Department

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

- 3.1 Director for Special Education

Signature

Date

4.0 DEFINITIONS:

- 4.1 SLPS – Saint Louis Public Schools
4.2 SPED – Special Education Department

5.0 PROCEDURE:

- 5.1 SPED receives a parent referral (verbal or written) Determines if there is reason to suspect a disability; **OR**
- a) For ECSE: Referrals from First Steps are parent referrals; referrals from outside agencies such as Head Start, PAT or childcare providers require parent contact to determine if parent desires referral.
- 5.2 Provide procedural safeguards within 5 school days of parent request.
- 5.3 SPED staff determines if there is a reason to suspect a disability.
- 5.4 **If THERE IS, A REASON** to suspect a disability a Review of Existing Data is conducted within 30 calendar days of parent referral. This starts the evaluation process.; **GOTO 5.5**
- a) **If THERE IS NO REASON** to suspect a disability, provide the parent with a Notice of Action – Refused within 30 calendar days of parent referral. If no additional data needed – provide parents prior written notice of Action for initial Evaluation; **GO TO 5.6**
- 5.5 If Additional Data needed – provide Parents Prior written Notice of Action for initial evaluation
- a) Receive written consent from parent / guardian
b) Conduct Evaluation; **GOTO 5.7**
- 5.6 Receive written consent from parent / guardian

ACADEMIC PROCESS MANAGEMENT PROGRAM

5.7 Conduct Eligibility Determination Meeting within 60 calendar days of receipt of consent for initial evaluation

- a) **FOR ELIGIBLE STUDENTS** develop IEP within 30 calendar days of eligibility determination; provide parent with prior written Notice of action for initial services and an Evaluation Report; **OR**
- b) **FOR INELIGIBLE STUDENTS** provide parent with prior written Notice of Action – ineligibility and an Evaluation Report

6.0 ASSOCIATED DOCUMENTS:

6.1

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
N/a	N/a	N/a	N/a	N/a

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
11/1/19	A	Initial Release

***** End of procedure *****

**PRINCIPAL AND ASSISTANT PRINCIPAL INFORMATION/
MEETING REQUEST PROCEDURE
(LDV-P001)**

Academic Office

1.0 SCOPE:

- 1.1 This procedure is applicable when principals and/or assistant principals are requested to attend a meeting, submit a report, or respond in any way to Central Office personnel.

2.0 RESPONSIBILITY:

- 2.1 Deputy Superintendent for Academics
2.2 Network Superintendents
2.3 Director for Leadership Development

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

- 3.1 Deputy Superintendent for Academics

Signature

Date

4.0 DEFINITIONS:

- 4.1 n/a

5.0 PROCEDURE:

- 5.1 The **request for information** should be submitted to the Chief Academic Office and not directly to the building level administrator.
- a) The Chief Academic Office determines the feasibility of the request and forwards the request either to the appropriate Central Office Division or to the Network Superintendents and/or the building level administrator.
- 5.2 The **request for report** should be submitted to the Chief Academic Office and not directly to the building level administrator.
- a) The Chief Academic Office determines the feasibility of the request and forwards the request to either the appropriate Central Office Division or to the Network Superintendents and/or the building level administrator.
- 5.3 The **request for meetings of any type** should be submitted to the Chief Academic Office and not directly to the building level administrator.
- a) The Chief Academic Office determines the feasibility of the request and forwards the request to the Leadership Development Office to calendar any such actions.
- 5.4 The **request for placement on the agenda of the regularly scheduled Leadership Development Professional Learning Experience (PLE) for principals and assistant principals** should be submitted to the Leadership Development Office.
- a) The Leadership Development Office fields the requests and submits the agenda to the Chief Academic Office with collaborative approval.

ACADEMIC PROCESS MANAGEMENT PROGRAM

- b) All requests must be submitted no later than 3 weeks prior to the regularly scheduled Leadership Development Professional Learning Experience (PLE) per the calendar set at the beginning of the fiscal year.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Request for Information / Report from Building Leadership (LDV-AD001)
- 6.2 Request for Meeting Building Leadership (LDV-AD002)
- 6.3 Request for Placement on the Agenda (LDV-AD003)

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
AD001	Electronic Folder	3 years	Delete as Desired	Password Protected Folder
AD002	Electronic Folder	3 years	Delete as Desired	Password Protected Folder
AD003	Electronic Folder	3 years	Delete as Desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
04/01/2008	A	Initial Release
09/27/2019		Revision

* * * E n d o f p r o c e d u r e * * *

**CONTACT HOURS PROCEDURE
(PDV-P002)**

Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the process that is used to report professional development contact hours for Saint Louis Public Schools

2.0 RESPONSIBILITY:

- 2.1 Department Heads

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

- 3.1 Director for Professional Development
3.2 PD Specialist- MyLearningPlan/Frontline
3.3 Deputy Superintendent for Academics / CAO

Signature

Date

4.0 DEFINITIONS:

- 4.1 SLPS – Saint Louis Public Schools
4.2 DESE – Department of Elementary and Secondary Education

5.0 PROCEDURE:

- 5.1 Site staff records professional development hours on the professional development contact hour log within MyLearningPlan/Frontline.
5.2 Copies of the logs are documented within the MyLearningPlan/Frontline system and are verified by the principals.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Contact hour log
6.2 Individual Professional Development Plan (IPDP)
6.3 Mentor Logs (as applicable)
6.4 Professional Development Portfolio

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Contact hour Log	Electronic Folder	5 years	Delete as Desired	Password Protected Folder
IDP Plan	Electronic Folder	5 years	Delete as Desired	Password Protected Folder
Mentor Log	Electronic Folder	5years	Delete as Desired	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
04/01/2008		Initial Release
09/27/2019	A	Revision

*** End of procedure ***

**CALENDERING PROFESSIONAL DEVELOPMENT
(PDV-W001)**
Academic Office

1.0 SCOPE:

- 1.1 This work instruction discusses the process that is used to schedule/ calendar professional development for Saint Louis Public Schools.

2.0 RESPONSIBILITY:

- 2.1 Department Heads

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

- 3.1 Director for Prof Development
3.2 PD Specialist- MyLearningPlan/Frontline
3.3 Deputy Superintendent for Academics / CAO

Signature

Date

4.0 DEFINITIONS:

- 4.1 SLPS – Saint Louis Public Schools

5.0 PROCEDURE:

- 5.1 Go to the MyLearningPlan/Frontline website.
5.2 Select “Professional Development Offerings”.
5.3 Enter in the calendar: event, date (mm-dd-yy format), title, and target audience, start and stop time (24hr format – 3:00 p.m. = 15:00), location w/ address, room, contact person and phone number, and division. Multiple events can be input at one time. Any revisions should be reported monthly.
5.4 Reserve / secure the room and obtain district authorization before submitting to professional development.
5.5 Enter professional development on an ongoing basis.

6.0 ASSOCIATED DOCUMENTS:

N/A

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
N/a	N/a	N/a	N/a	N/a

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
04/01/2008		Initial Release
09/27/2019	A	Revision

***** End of instruction *****

ACADEMIC PROCESS MANAGEMENT PROGRAM

SUMMARY & REPORTING CALENDER REPORT

(PDV-W002)

Academic Office

1.0 SCOPE:

- 1.1 This work instruction discusses the process that is used to consolidate the professional development calendar for Saint Louis Public Schools.

2.0 RESPONSIBILITY:

- 2.1 Director for Prof Development
2.2 PD Specialist- MyLearningPlan/Frontline

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

- 3.1 Director for Prof Development
3.2 PD Specialist- MyLearningPlan/Frontline
3.3 Deputy Superintendent for Academics / CAO

Signature _____

Date _____

4.0 DEFINITIONS:

- 4.1 SLPS – Saint Louis Public Schools

5.0 PROCEDURE:

- 5.1 Go to the MyLearningPlan/Frontline website.
5.2 Select "Report".
5.3 Enter the selection criteria and run report.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Event sign-in sheets

7.0 RECORD RETENTION TABLE

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Event sign-in Sheets	Electronic Folder	1 year	Discard after 1 year	Password Protected Folder

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
04/01/2008		Initial Release
09/27/2019	A	Revision

*** End of procedure ***

**TRANSLATION REQUEST PROCEDURE
(EBM-P001)**

Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the process that is used for Staff to request translations of district-wide documents and forms designed for communication with district parents.

2.0 RESPONSIBILITY:

- 2.1 District Staff
2.2 Language Access Team

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

Signature

Date

- 3.1 ELL Director

4.0 DEFINITIONS:

- 4.1 SLPS – St. Louis Public Schools
4.2 ELL – English Language Learners

5.0 PROCEDURE:

- 5.1 District staff member identifies a need for translation.

5.1.1 Review SLPS Library of Translated District Documents and Forms to check if the document is already available in multiple languages.

5.1.2. Contact SLPS department/office that developed the document/form to check if translation has been requested already.

- 5.2 District staff member fills out the following sections of the Translation Request Form:

- a) Date of request
- b) Staff requesting translation
- c) Staff phone/e-mail address
- d) Language/s needed (select from the top district languages listed on the Translation Request Form)
- e) Date needed

- 5.3 District staff member submits completed Translation Request Form along with a document to be translated to the SLPS Translator/Interpreter coordinating translation requests.

- a) The document to be translated must be submitted in a Word, Excel, or PPT format.
- b) Translation requests must be submitted at least 10 days prior to the date needed.

- 5.4 SLPS Translator/Interpreter coordinating translation requests reviews the document to verify the following:

ACADEMIC PROCESS MANAGEMENT PROGRAM

- a) The document is a district-wide document/form.
 - b) The document is submitted in a proper format (Word, Excel, or PPT).
 - c) Requested languages are the top district languages.
- 5.5 SLPS Translator/Interpreter coordinating translation requests submits translation requests to the ELL Director for approval.
- a) Approved documents that involve languages available through the SLPS Language Access Team are forwarded to the SLPS Language Access Team for translation.
 - b) Approved documents that involve languages not available through the SLPS Language Access Team are forwarded to the SLPS language access vendors for translation.
- 5.6 Completed translations are sent to the requestor to be shared with district ELL parents and/or SLPS staff.
- 5.7 Completed translations are added to the SLPS Library of Translated Documents and Forms available on the district website.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Translation Request Form

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Translation Request	Electronic folder	Permanent	Permanent	Password

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
06/21/22		Initial Release

* * * E n d o f p r o c e d u r e * * *

**ROBO CALL REQUEST PROCEDURE
(EBM-P002)**

Academic Office

1.0 SCOPE:

- 1.1 This procedure discusses the process that is used for Staff to request robo call recording in multiple languages to support communication with district ELL parents.

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

2.0 RESPONSIBILITY:

- 2.1 District Staff
2.2 Language Access Team
2.3 Communications Office
2.4 Deputy Superintendent of Accountability, Research, Evaluation & Assessment

3.0 APPROVAL AUTHORITY:

Signature

Date

- 3.1 ELL Director

4.0 DEFINITIONS:

- 4.1 SLPS – St. Louis Public Schools
4.2 ELL – English Language Learners

5.0 PROCEDURE:

- 5.1 District staff member identifies a need for a robo call.
- 5.2 District staff member fills out the following sections of the Robo Call Request Form:
- a) Date of request
 - b) School requesting service
 - c) Staff requesting service
 - d) Staff phone/e-mail address
 - e) Language/s needed
 - f) Grade(s)
 - g) Date/time needed
- 5.3 District staff member submits completed Robo Call Request Form along with a robo call script to the SLPS Translator/Interpreter coordinating robo call requests.
- a) Robo Call requests must be submitted at least 4 days prior to the date needed.
 - b) School-specific robo call requests can be submitted by a school staff.

ACADEMIC PROCESS MANAGEMENT PROGRAM

- c) District-wide robo call requests must be submitted by a central office staff in collaboration with SLPS Communications Office.
- 5.4 SLPS Translator/Interpreter coordinating robo call requests reviews the document to ensure it includes all required information.
- 5.5 SLPS Translator/Interpreter coordinating robo call requests submits robo call requests to the ELL Director for approval.
 - a) Approved robo calls that involve languages available through the SLPS Language Access Team are forwarded to the SLPS Language Access Team for recording.
 - b) Approved robo calls that involve languages not available through the SLPS Language Access Team are forwarded to the SLPS language access vendors for recording.
- 5.6 Recording dates and times are sent to the Deputy Superintendent of Accountability, Research, Evaluation & Assessment for release to district ELL parents.
 - a) The requestor is copied on the e-mail sent to the Deputy Superintendent of Accountability, Research, Evaluation & Assessment.
 - b) SLPS Director of Communications is copied on the e-mail sent to the Deputy Superintendent of Accountability, Research, Evaluation & Assessment for all district-wide robo calls.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Robo Call Request Form

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Robo Call Request	Electronic folder	Permanent	Permanent	Password

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
06/21/22		Initial Release

*** End of procedure ***

APPENDIX

Understanding the Current-State Process

The organization should use a common template for Identifying / defining all key processes. This facilitates ongoing process oversight and coordination. When completed, this document captures all the information needed to provide a complete description of the process. It also includes information to support process diagramming and ongoing management. The attached “Process definition” template can be used to initially document a process; Sections can be added, removed or changed as needed. Improvements in the design or structure are encouraged.

To begin the improvement exercise, we recommend that the process owner complete a first draft of the current-state process, to be reviewed by the process improvement team. It is important to spend as little time on the current-state as possible, since the important work of the improvement team is to work on the future-state process.

The front cover of the process definition lists the name of the process. Each process should have a descriptive name. Typical process naming convention is to use a verb/noun combination, such as Manage Curriculum.

For the most part, processes support the organization’s mission; the process owner should estimate the importance of the process and describe any other important organizational activities that it supports.

Process importance is one consideration when prioritizing processes for formal management.

<Organization Logo>

Process Name

Process Definition

Process Importance: (check one)

☐ Critical to the Organization's Mission
☐ Important to the Organization's Mission
☐ Contributive to the Organization's Mission

This process supports the following organizational activities:

Indicate the Mission critical activities that this process supports here.

Name of Organization
Name of Process - Process Definition

1.0 Purpose

Provide a brief description of this Process and its results.

2.0 Trigger

Describe the conditions that cause this Process to start. (Is the Process initiated on a regular schedule or is it initiated in response to certain conditions?)

3.0 Process Organization

Role	Description	Name:
Process Sponsor (member of Executive Staff)	Has ultimate authority over and responsibility for management of the process.	
Process Owner	Develops and maintains the process definition, oversees the Process Team, tracks and disposes of issues and change requests, manages the budget, and is responsible for overall quality of the Process Outputs.	
Process Team	Are responsible for performing the Process Steps and producing the Process Outputs.	
Key Customers	Specific Process Customers who provide feedback to the Process Owner on Process Outputs.	

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Section 1.0 Purpose. This should be a clear and concise statement of exactly what the process is intended to accomplish.

Section 2.0 Trigger. The trigger is the condition or conditions that cause the process to begin. Some processes are repeated according to a schedule; other processes are initiated in response to particular conditions.

Section 3.0 Process Organization. The process sponsor and owner have already been covered. The process team members are all the individuals who work on any part of the process. The process owner should identify here the key positions involved in the performance of the process.

Key customers are the specific positions within the organization who use the process outputs. It is important to identify these positions and to understand their needs and expectations for how the process is performed and for the level of quality and timeliness required of the outputs.

Section 4.0 Policies/Guidelines. Many major processes in public education organizations are under some sort of regulatory constraint. Federal, state, and local laws all affect the operations of these institutions. In addition, each individual institution will have its own policies and guidelines that govern behavior and decision-making. This information is pertinent to the process and should be included or referenced in the definition document.

House of Organization
(Mean of Process) – Process Definition

4.0 Policies/Guidelines

reference all law, corporate policies, or other guidelines that impact this process.

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Name of Organization Name of Process - Process Definition												
5.0 Process Inputs (List the Process Inputs below. Include both tangible and intangible inputs.)												
<table border="1"> <thead> <tr> <th>Inputs</th> </tr> </thead> <tbody> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </tbody> </table>		Inputs										
Inputs												
6.0 Process Outputs (List the Process Outputs below. Include both tangible and intangible outputs.)												
<table border="1"> <thead> <tr> <th>Outputs</th> </tr> </thead> <tbody> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </tbody> </table>		Outputs										
Outputs												

Section 5.0 Process Inputs. Anything that is consumed by the process team in carrying out the process steps is an input. Some inputs will be tangible objects like documents, tools, and supplies. Other inputs will be intangible things like data.

Section 6.0 Process Outputs. Everything that is produced by the project team in carrying out the process steps is an output. As with process inputs, there are both tangible and intangible outputs.

Not all inputs and outputs will be obvious when the process owner initially develops the definition. The owner will no doubt identify additional inputs and outputs while developing the detailed process steps. The point is to ultimately capture all this information in this document.

Section 7.0 Process Steps. The process owner uses this section to list all the steps in the current process, with the goal of describing the work of the process in a series of small, unambiguous steps.

This description should allow a person assigned to perform this process to correctly carry out the process with minimal help. This document should be an adequate training guide for new process team members as well as part of the job description of

[illegible]

current team members.

For each step, the process owner should list the positions of the process team who carry out that step. Responsibility for every part of the process should be clear to assure accountability and efficiency.

In the case of very large processes, it may be easier to divide the process into sub- processes that are defined separately. It is difficult to generalize about subdividing processes, because so much depends on the particular situation. However, steps should be grouped according to continuities in location, time, tools or templates used, or persons involved. Ultimately, the goal of the process definition is to clearly and unambiguously describe the actions involved. To justify subdividing a process, it must result in a clearer understanding.

Process Definition Template

Academic Office Operations

[Process Name]

Process Importance: (check one)

- ☐ Critical to the Academic Office's Mission
- ☐ Important to the Academic Office's Mission
- ☐ Contributes to the Academic Office's Mission

This process supports the following organizational activities:

1.0 Purpose

<Provide a brief description of this Process and its results>

2.0 Trigger

<Describe the conditions that cause this Process to start. (Is the Process carried out on a regular schedule, or is it initiated in response to certain conditions?>

3.0 Process Organization

Role	Description	Names
Process Sponsor (member of Executive Staff)	Has ultimate authority over and responsibility for management of the process.	
Process Owner	Develops and maintains the process definition, oversees the Process Team, tracks and disposes of issues and change requests, manages the budget, and is responsible for overall quality of the Process Outputs.	
Process Team	Are responsible for performing the Process Steps and producing the Process Outputs.	
Key Customers	Specific Process Customers who provide feedback to the Process Owner on Process Outputs.	

4.0 Policies/Guidelines

<Reference any Policy or guidelines that impact this process>

5.0 Process Inputs

(List the Process Inputs below. Include both tangible and intangible Inputs.)

Inputs

6.0 Process Outputs

(List the Process Outputs below. Include both tangible and intangible Outputs.)

Outputs

7.0 Process Steps

(Use the table below to list the individual Process Steps.)

Step #		Responsible Person
1	<Describe Process Steps>	

Writing a Procedure

Responsibilities for Procedures:

- Each division is responsible for writing their procedures.
- Administrators for the division have approval of all procedures under their areas of responsibility.

Requirements of Procedures:

- Procedures must be under some form of document control. (numbered, revision, & dated)
- Procedures reference inner-related procedures and quality system documentation created from following the procedure.

Procedures should specify:

- What should be done?
- Who will do it?
- When will it be done and in what sequence?
- How will it be done?
- What equipment, tools or materials will be used?
- What forms or other documents will be used?
- An appendix for all forms used in the procedure
- A flow chart for the procedure (where applicable the flow chart can be the procedure if it is understandable)
- Signed, dated authorizations under revision control with controlled distributions.

Other considerations to incorporate in procedures:

- Definitions
- Referencing standards
- Documentation

Writing a Work Instruction

Responsibilities for Work Instructions:

- Each division is responsible for writing their work instructions.
- Administrators for the division have approval of all work instructions under their areas of responsibility.

Requirements of Work Instructions:

- Work Instructions must be under some form of document control. (numbered, revision, & dated)
- Work Instructions reference inner-related procedures and quality system documentation created from following the procedure.

Work Instructions should specify:

- What should be done?
- Who will do it?
- When will it be done and in what sequence?
- How will it be done?
- What, tools or materials will be used?
- What forms or other documents will be used?
- An appendix for all forms used in the instruction.
- A flow chart for the instruction.
- Signed, dated authorizations under revision control with controlled distributions.

Other considerations to incorporate in work instructions:

- Definitions
- Referencing standards
- Documentation

ACADEMIC PROCESS MANAGEMENT PROGRAM

<ENTER NAME OF PROCEDURE> (XXX-PXXX)

ACADEMIC OFFICE

1.0 SCOPE:

1.1 <Enter Text>

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

2.0 RESPONSIBILITY:

2.1 <Enter Text>

3.0 APPROVAL AUTHORITY:

3.1 <Enter Text>

Signature _____

Date _____

4.0 DEFINITIONS:

4.1 <Enter Text>

5.0 PROCEDURE:

5.1 <Enter Text>

6.0 ASSOCIATED DOCUMENTS:

6.1 <Enter Text>

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
<Enter Text>	<Enter Text>	<Enter Text>	<Enter Text>	<Enter Text>

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
<Enter Date>	<Enter Text>	<Enter Text>

End of procedure

ACADEMIC PROCESS MANAGEMENT PROGRAM

<ENTER NAME OF WORK INSTRUCTION> (XXX-WXXX)

ACADEMIC OFFICE

9.0 SCOPE:

9.1 <Enter Text>

The online version of this instruction is official. Therefore, all printed versions of this document are unofficial copies.

10.0 RESPONSIBILITY:

10.1 <Enter Text>

11.0 APPROVAL AUTHORITY:

11.1 <Enter Text>

Signature _____

Date _____

12.0 DEFINITIONS:

12.1 <Enter Text>

13.0 PROCEDURE:

13.1 <Enter Text>

14.0 ASSOCIATED DOCUMENTS:

14.1 <Enter Text>

15.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
<Enter Text>	<Enter Text>	<Enter Text>	<Enter Text>	<Enter Text>

16.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
<Enter Date>	<Enter Text>	<Enter Text>

End of procedure