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COMPANION GUIDE FOR:

SUMMER PLANNING CALENDAR

This document provides guidance on how to use the Summer Planning Calendar tool available in the Summer Learning Toolkit. You can also access the tool in the Planning and Management section of the Toolkit.

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QUICK START: HOW TO NAVIGATE AND USE THE SUMMER PLANNING CALENDAR

Here are a few steps to help you get oriented to the Summer Planning Calendar:

1. Begin by reading the first two sections of this Companion Guide: [Introduction](#) and [How to Use the Summer Planning Calendar Workbook](#).
2. Download and review the [Summer Planning Calendar Workbook](#) to get familiar with how it is organized.
3. Return to this Companion Guide and scan the sections on each [Planning Category](#) to familiarize yourself with the guidance provided.
4. Once you are familiar with the two resources and are ready to begin planning, refer back to the [How to Use the Summer Planning Calendar Workbook](#) section of this guide.

INTRODUCTION

The Summer Planning Calendar supports school districts and their partners to take a year-round, comprehensive approach to planning academic summer programs. It is comprised of two complementary resources: the [Workbook](#) and the Companion Guide. The Summer Planning Calendar is based on the approaches of a set of [districts and their partners](#) and draws best practices from their experiences as well as research and recommendations from the RAND Corporation and technical assistance and guidance provided by the Wallace Foundation. The Calendar illustrates a 12-month planning approach and includes responsibilities shared among district, department, and summer-site leaders.

As previously mentioned, the Summer Planning Calendar includes two resources:



Summer Planning Calendar Workbook ("the Workbook")

The Workbook lays out best practices in key planning tasks, including how they should be timed and sequenced, and is designed to help you formulate your own plan and track progress throughout your planning process. See more about the Workbook in the next section: [How to Use the Summer Planning Calendar Workbook](#).

The Workbook organizes tasks and activities into 14 planning categories that represent the major areas of work required to design and deliver comprehensive summer programs. Planning categories include things like Program Budget and Curriculum. Each planning category is comprised of:

- **KEY ACTIVITIES** – primary activities that often involve multiple stakeholders and span several months
- **TASKS** – steps to complete the *key activities* that often occur within one or two months
- **RELATED TIPS** – general guidance or recommendations

The Workbook can be viewed two ways:

- **12-Month Summary:** a snapshot of the *key activities*, organized by *planning category*, with a month-by-month calendar to indicate when activities are likely to occur throughout the year.

- By Planning Category: a more detailed timeline of *key activities* and *tasks*, organized by *planning category*.

The last tab in the Workbook creates a sortable task list by compiling information from each planning category tab into one list. Instructions to create a chronological task list are included at the top of the Sortable Task List tab.



Summer Planning Calendar Companion Guide (“the Companion Guide”)

The Companion Guide (what you are currently reading) provides additional guidance to help users design their own program planning approach, schedule, and activities. The Companion Guide includes:

- Links to research on best practices;
- Definition of key terms;
- Guidance on sequence of tasks and activities;
- Month-by-month view of recommended planning timeline; and
- Planning tips and recommendations.

HOW TO USE THE SUMMER PLANNING CALENDAR WORKBOOK

After a quick walkthrough of the [Workbook](#) and Companion Guide, follow these recommended steps to customize a planning calendar for your district:

1. Go through the Workbook one Planning Category at a time reviewing the activities and tasks. Then review the corresponding guidance in this Companion Guide.
2. Eliminate Workbook activities or tasks that do not apply to your program model. For example, transportation-related activities specific to planning bussing routes will not be applicable to programs where students walk or take public transit.
3. Estimate the start date of your program, and set the timeline and deadlines to match your schedule.
4. Determine who needs to be engaged in planning to make key decisions and execute tasks involved in program design and implementation for each planning category.
5. Identify when decisions, key activities, or tasks should be managed at the district level and which should be managed at the site level.
6. Designate general roles and responsibilities for planning team members
7. Begin filling in the Workbook with your planning details (see below).
8. Throughout the year, add other tasks deemed necessary to your planning process that are not included in the Workbook.
9. Sort the Sortable Task List regularly to reflect up-to-date changes and progress.
10. Consider other ways you can use the Workbook to customize tools to support your planning process. For example, use the chronological task list to create a 12-Month Summary to reflect your planning process. Or, use stop-light color-coding to emphasize the status of planning tasks.



TIP

The Workbook's 12-Month Summary view is a great way to view the relationship between planning categories and the timing of key activities.

COMPLETING THE WORKBOOK

The [Workbook](#) is designed to help you plan in alignment with best practices and track progress throughout your planning process. Each planning category includes a spreadsheet for you to complete and update regularly. For each task in the Workbook, populate the following information:

- **COLUMN A: ESSENTIAL VS. RECOMMENDED** – the template includes recommendations on whether the task is Essential or Recommended for your planning process; if necessary, change the cell values to reflect your planning process using E for Essential or R for Recommended.
- **COLUMN B: KEY ACTIVITIES & TASKS** – the template includes recommended activities and tasks for your planning process – no input required.
- **COLUMN C: RECOMMENDED TIMELINE** – the template includes recommended month(s) task should occur – no input required.
- **COLUMN D: OUR TIMELINE** – month(s) the task should occur in your program.
- **COLUMN E: WHO'S RESPONSIBLE?** – staff responsible for managing the task to completion.
- **COLUMN F: APPROVAL REQUIRED** – indicate if approval from district leadership is required for task completion by selecting an option from the dropdown menu. To add or change the approval options, scroll down below the Workbook table. You may edit the existing options or add to the list in the YELLOW cells only.
- **COLUMN G: IF APPROVAL REQUIRED, BY WHOM?** – staff responsible for final approval, if applicable.
- **COLUMN H: DEADLINE** – target deadline for task completion.
- **COLUMN I: STATUS** – select a status from the dropdown. To add or change the Status options, scroll down below the Workbook table. You may edit the existing options or add to the list in the YELLOW cells only.
- **COLUMN J: DATE COMPLETED** – date of task completion.
- **COLUMN K: NOTES – Planning Dependencies, Challenges, or Delays** – critical dependencies between planning categories and/or activities that influence planning timeline or deadlines; challenges or delays important to note for planning future programs.

A FEW IMPORTANT THINGS TO KEEP IN MIND:

1. Your planning timeline may be different.

The suggested timing of key tasks and activities are estimated for a summer program that begins in late June. Users should modify the schedule based on their summer program start and end dates.

2. Your planning experience and capacity may dictate your choices.

The calendar is designed for districts of varying experience, ranging from those creating a new summer learning program to districts with several years of experience. Throughout the Workbook, tasks are identified as either:

- E** ESSENTIAL – these tasks are critical for implementation and should be included in any district’s summer program planning; or
- R** RECOMMENDED – these tasks raise the bar of quality in program design and planning and are appropriate for districts with some experience operating a summer program. Many of these tasks align with RAND’s evidence and recommendations from its formative evaluation of a set of districts that had several years of experience operating summer programs.

3. Some tasks may vary depending on the size and scope of your program model.

The calendar is based on the experiences of a set of districts that operated programs with a centralized model; most decisions about program design, structure, student engagement, staffing, content, and operating procedures were made at the district level. Sites within the district had some authority or flexibility to implement practices that added to creating a site-specific culture. While these districts use a centralized model, many districts across the country utilize a decentralized program model. Those districts should use the Planning and Management spreadsheet in the Workbook to consider how to modify these approaches for site-driven program design, partnership development, and planning processes.

4. Planning activities and tasks throughout the calendar are interdependent.

Consider the dependencies among activities as you think about the appropriate sequence, timing, and deadlines for your tailored calendar. For example:

- Curriculum must be selected or developed in time to create and deliver a high-quality training for instructional staff. Delaying professional development reduces the amount of time staff have to prepare, and limited staff preparation can result in less efficient or effective use of instructional time.
- Student attendance policies must be defined early so they can be included in recruitment and enrollment materials for families.

DESIGNING YOUR PLANNING CALENDAR AND APPROACH

This guide includes specific guidance for each of the 14 planning categories in the Summer Planning Calendar that represent major areas of work required to design and deliver comprehensive summer programs. Click on the category to go directly to that section:

1. [Planning and Management](#)
2. [Continuous Improvement Process](#)
3. [Program Budget](#)
4. [Facilities](#)
5. [Student Recruitment](#)
6. [Staffing and Hiring](#)
7. [Curriculum](#)
8. [Enrichment](#)
9. [Professional Development](#)
10. [Site Operations and Culture](#)
11. [Schedules and Rosters](#)
12. [Transportation](#)
13. [Meals](#)
14. [Supplies](#)

WHY ADVANCED, COLLABORATIVE PLANNING FOR SUMMER IS IMPORTANT

In [Getting to Work on Summer Learning, 1st ed.](#), RAND emphasizes that a good planning process is critical to designing and executing a high-quality program. Through their study of the National Summer Learning Project, RAND further identified a number of planning practices that resulted in greater consistency and quality across sites, and ultimately, more enjoyable programs for youth. RAND found that districts ran stronger programs when they had these key practices in place:

- Planning calendars that began by December;
- A dedicated summer planning lead with authority to engage or oversee departmental leaders;
- Cross-departmental planning teams with defined roles and responsibilities;
- Engagement of summer site leaders in planning; and
- A process to collect and discuss data focused on program attendance, instructional time and practices, and site climate.

PLANNING CATEGORIES

1. Planning and Management

Why planning and management is important

Through its New Vision for Summer School Network, the [National Summer Learning Association](#) promotes a vision that “school districts and schools use the summer as part of a 12-month plan for learning to accelerate their priorities around student and teacher success.” Central to this vision is a [core principle](#) to embed summer learning into the district’s year-round operations.

Aligned with this vision, RAND studied district integration efforts in three districts – Dallas, Pittsburgh, and Rochester. Summer learning leaders reported that embedding summer into district year-round priorities and operations resulted in improved program quality, increased efficiencies, movement toward program sustainability, and a better connection between summer and year-round programming. RAND’s [Making Summer Last: Integrating Summer Programming into Core District Principles and Operations](#) report highlights critical steps to move toward integration, including garnering buy in from district leadership and across departments, allocating resources in the district’s annual budget, taking a year-round approach to planning, including summer planning responsibilities in key positions, and setting expectations for program sustainability.

How to get started

Prioritize building your planning team, defining a governance structure, and developing systems to manage and support program planning.

Planning tips and recommendations

- ✓ To garner district support for integration, build awareness among chief executives, the board, and departmental leaders about how the summer program helps improve academic achievement and moves the district toward specific goals. Districts used several approaches to build awareness among leaders, including sharing student testimonials during cabinet meetings, facilitating summer

site visits with leaders, and engaging staff in student outreach and recruitment.

- ✓ Build a central office leadership team that includes representation from key departments and cabinet-level officials, including: Human Resources, Payroll, Curriculum and Instruction, Data Assessment, Student Support Services, Transportation, Technology/Information Systems, Facilities, and Meals.
- ✓ Hire or identify a summer program lead with authority to lead program planning and engage and manage members of the leadership team.
- ✓ Begin regular planning meetings in the fall, and meet at least monthly.
- ✓ Beginning in the late winter, include budget reviews as a regular agenda item.
- ✓ Beginning in late winter / early spring, engage site-level leadership including principals in planning meetings.
- ✓ Meet regularly during the summer program to monitor program execution and address program-wide and site-level needs.
- ✓ Discuss whether changes are needed to planning team structure or responsibilities during end-of-summer debriefs.

Planning and Management		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
KEY ACTIVITIES & TASKS													
Outline cross-departmental leadership structure for planning													
E	Confirm staff lead to oversee summer program planning												
E	Define roles and responsibilities for district, site leadership, and partner staff related to program planning and implementation												
E	Develop system to coordinate and track planning												
E	Determine members of planning team												
Determine planning process and timeline													
R	Develop monthly planning schedule with key tasks, monthly deadlines, and who's responsible (including district, site leadership, and partner staff)												
R	Identify planning expectations (responsibilities, meeting schedule) for all staff to include in job descriptions												
R	Identify planning expectations (responsibilities, meeting schedule) for all partners to include in partner agreements												
R	Collect feedback on the delineation of roles and responsibilities for planning, program management, and evaluation during annual debrief with district staff, site leadership, and partners												
Facilitate regular planning meetings													

E = Essential Task

R = Recommended Task

2. Continuous Improvement Process

Why a continuous improvement process is important

Summer program continuous improvement processes vary greatly and are based on a number of factors, such as a district's year-round evaluation processes, priorities and capacities for measuring student outcomes and teacher performance, and systems for gathering stakeholder feedback. In [Getting to Work on Summer Learning, 2nd ed.](#), RAND found that districts that collected and used data to drive program reflection and planning with program and district leadership made changes that resulted in substantial improvement to the effectiveness and cost effectiveness of the program. In particular, RAND recommends building a process to collect and discuss data focused on program attendance, instructional practices, use of time, and site climate. Improving overall program quality can increase student engagement and ultimately yield better student outcomes.

How to get started

Begin by setting goals for program quality and student outcomes. Next, develop assessments to measure both, and determine the processes you will use for data collection, analysis, and sharing. Consider which processes will work best with your district's year-round evaluation and improvement approach. Many summer programs collect the spring and fall benchmark test scores of summer program participants to assess the impact of the summer program on reading and math. Other programs administer pre/post tests during the summer program or conduct program observations to collect data.

Planning tips and recommendations

- ✓ Include in your comprehensive evaluation plan ways to assess and monitor if the program is being implemented as designed across sites and if the program is achieving its goals for student outcomes. These may include site visit or observation protocols and assessments completed by students, teachers, and/or parents.
- ✓ Disaggregate and analyze data on high-attenders, low-attenders, and no-shows to understand the relationship between

attendance and student outcomes and to inform recruitment, budgeting, and facilities planning for the next year.

- ✓ Conduct **debriefs** with planning teams to discuss data and stakeholder feedback and identify improvement goals for the following summer.
- ✓ Share end-of-summer results with all stakeholders including district and school leadership, program partners and funders, program staff, enrichment providers, and families. Provide opportunities for stakeholders to discuss results and provide feedback that informs planning for the following summer.
- ✓ At the end of the summer, reflect on the professional development plan to identify strengths and areas for improvement based on program outcomes.

Continuous Improvement Process													
KEY ACTIVITIES & TASKS		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Develop new or refine existing program evaluation plan													
R	Begin to discuss the evaluation plan for next summer												
R	Define or update program goals and expected outcomes												
R	Finalize program evaluation plan including systems and processes for data collection, analysis, dissemination, and application												
E	Determine data sharing requirements and include relevant language in partner MOUs												
E	Select or develop assessments to measure program quality and student outcomes (e.g. youth academic and social emotional skills; instructional quality; effectiveness of professional development; and participant, staff and stakeholder satisfaction, etc.)												
E	Develop mechanism to monitor fidelity of curriculum and enrichment implementation												

Use data to inform instruction and program development												
R	Share end-of-summer data from previous summer with program stakeholders											
E	Conduct debrief with planning team and examine data from previous summer to identify improvements for next summer											
R	Collect spring reading and math data to form class groupings by ability levels											
R	Provide data in an easily accessible format to classroom teachers											
Execute evaluation												
R	Collect and analyze fall student testing data and compare to previous spring testing data to assess student and program outcomes from the previous summer program											
R	Administer pre-assessments according to schedule (e.g. spring school-year assessments or in-program skills pre-assessment)											
E	Collect and analyze student daily attendance data											
E	Observe academic and enrichment instruction and provide feedback to staff during and at the end of the program											
R	Conduct end-of-program assessment (if applicable)											
R	Conduct focus groups to gather feedback from key stakeholders including students, families, staff and partners											
E	Analyze collected data											
E	Develop list of students that met promotion criteria (if applicable)											
R	Begin to prepare end-of-summer data reports on enrollment, attendance, program quality, student outcomes, and satisfaction surveys (staff, student, families, and partners) for various stakeholder groups, including principals											

E = Essential Task

R = Recommended Task

3. Program Budget

Why the program budget is important

Designating sufficient **resources** to implement your summer plan with high quality and fidelity to program design is critical to its success. Careful resource planning and allocation can also ensure that you are spending precious funds on the most important elements of your program.

How to get started

Begin by developing your budget with estimated costs for site operations and administrative overhead. Then, compare cost projections against existing funds to identify funding needs, and develop a plan to secure additional funds. Next, develop your internal budget management systems and processes. Keep in mind that while funding models for summer programs can range in complexity—some districts use a single source of restricted or unrestricted funds to support program operations while others complement district funds with foundation grants and public funding—the budget development process takes time and involves multiple iterations and negotiations between district and program leaders. Plan ahead and communicate often.

Planning tips and recommendations

- ✓ Explore a variety of funding sources and resources to support the program including school district general funds, other city funding, Title I, 21st Century Community Learning Centers, IDEA-B, Title II, AmeriCorps, private philanthropy, corporate and individual donors, and participant fees.
- ✓ Base your staffing estimates on your historic "no-show" rate. If you don't have one, assume a 15% no-show rate.
- ✓ Additionally, plan for attrition within projected enrollment to more accurately project expenses related to staff, materials/supplies, facilities, and transportation for field trips. Use historic average daily attendance rates (ADA) for budget estimates; if you don't have one, assume a 75% ADA.

- ✓ Analyze expenses against the budget quarterly to identify funding gaps and adjust the budget as needed.

Program Budget												
KEY ACTIVITIES & TASKS		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	AUG
Prepare budget for summer program												
E	Estimate budget based on prior year budget and actual expenditures											
R	Schedule regular meetings with finance or other administration to periodically review budgets											
E	Determine primary costs for each site including personnel, facilities, meals, transportation, materials and supplies, and administrative and overhead costs											
E	Discuss budget estimates with district leadership											
E	Confirm existing federal, state, local, district, and philanthropic funds that will support the program											
E	Identify revenue gaps and operating categories that require additional funding											
E	Present draft budget to district leadership for approval											
E	Confirm budget to operate each summer site and update budget draft											
E	Engage the leadership planning team to review the updated draft budget											
E	Finalize program budget											
Plan for program sustainability												
R	Identify potential funding sources to support program growth and sustainability											
R	Prepare fundraising materials including case statements, proposals, budgets, impact data, etc.											

R	Confirm new funding, update budgets and revenue sources, and develop plan for managing funding based on requirements												
Manage and reconcile budget regularly													
E	Develop payment process for enrichment partners and vendors												
E	Develop process to manage and track expenditures against budget												
E	Process final expenses and payments												
E	Reconcile all expenditures against budget												
E	Prepare financial reports for district/community leaders and program funders												

E = Essential Task

R = Recommended Task

4. Facilities

Why facilities are important

Choosing the right sites for your program is based on several factors—the anticipated body of students, school feeder patterns, building capacity, planned capital improvements, and program needs for special spaces or equipment (e.g. technology, music, art, physical fitness, etc.). Early planning is critical to ensure smooth building operations, particularly at sites where summer leadership will be different than during the school year.

How to get started

Begin by developing a list of possible sites for the summer program, considering enrollment goals, neighborhoods where targeted students live, and adequacy of building assets based on program needs. Then meet with the facilities department to determine if any buildings may be scheduled for capital improvements in the summer.

Planning tips and recommendations

- ✓ Identify community-based programs that may target similar students for recruitment. Consider ways to differentiate services in marketing materials to enable families to select programs that best meet their needs and interests. Additionally, avoid selecting program sites in areas with high availability of community programs to minimize competition for program enrollment and attendance.
- ✓ Include room and equipment use as part of written agreement to ensure access to supply closets and necessary equipment such as copiers.
- ✓ Specify need for full building access in building permits/written agreements.
- ✓ Consider data on high-attenders, low-attenders, and no-shows from previous summers to inform facilities planning.
- ✓ Ensure sufficient custodial and grounds services are scheduled for the program months.

Facilities		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
KEY ACTIVITIES & TASKS													
Identify sites for summer program													
R	Develop list of targeted sites to host summer programs												
E	Meet with directors of facilities and custodial services to review building capacity and capital improvements or construction planned for the summer												
E	Research city and school district summer permitting processes, if applicable												
R	Create a preliminary projection of the number of students that will attend each site												
E	Confirm dates for summer program based on school calendar and facilities availability												
E	Confirm sites and available classrooms for summer program												
E	Identify contacts for facilities, equipment, etc., at each site												
R	Develop written agreement that describes how the sites will be used												
E	Notify school year principals of site selection and requirements for hosting summer program												
E	Determine feeder patterns, if applicable												
Prepare sites for program implementation													
R	Conduct meetings between summer site principals and school-year principals to discuss facility needs, emergency plans, bus drop-off locations, etc.												
E	Coordinate with district (and/or city if appropriate) to ensure school zones operate during the summer and that crossing guards are available at all locations												
R	Conduct site walk-throughs												
R	Develop safety plan for summer site principals to share with staff during professional development												

5. Student Recruitment

Why student recruitment is important

As highlighted in [Marketing Summer Learning to Parents and Students: Lessons from the National Summer Learning Project](#), getting the right students to register for your program, show up, and participate regularly is no easy feat. It requires advanced planning, consistent outreach, targeted messages and compelling materials, and relationship-building between program staff and families. With guidance from Crosby Marketing Communications, a set of districts designed and implemented recruitment plans with great success—all exceeded their recruitment goals and reduced their no-show rates from previous summers.

How to get started

Begin by developing marketing and recruitment strategies. Consider the students you hope to engage and the different ways you can connect with them over the months leading up to the program. Set recruitment goals, a plan for outreach activities, and systems to measure the impact of your efforts.

Planning tips and recommendations

- ✓ Consider program goals and capacity when prioritizing students for recruitment.
- ✓ Build separate strategies and activities for connecting with students and parents/caregivers into your recruitment and outreach plans.
- ✓ Develop targeted recruitment and outreach strategies for students who attended regularly the previous summer versus those who

did not show up or attend regularly.

- ✓ Use a variety of methods to connect with families including events, mailers (letters, postcards, program newsletter, flyers), robo calls, individualized teacher and principal outreach, and registration incentives.
- ✓ Set the registration deadline 2-3 months in advance of program start; enrollment numbers are critical for planning related to facilities, transportation, meals, supplies, etc.
- ✓ Ensure that communications emphasize that the program is not a drop-in program, and that attendance is expected.
- ✓ Programs often experience attendance dips on Fridays and after the Fourth of July weekend. Plan additional outreach strategies to ensure student retention throughout the program.

See the [Summer Learning Recruitment Guide](#) for more detailed tips and best practices.

Student Recruitment		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
KEY ACTIVITIES & TASKS													
Develop intentional marketing and recruitment strategies													
R	Identify all audiences with whom you need to communicate (e.g. priority families and students for recruitment)												
R	Identify strategies for successfully reaching each of your target audiences												
R	Develop a timeline for all outreach and recruitment activities												
R	Develop strategies to measure success												
Prepare student identification and recruitment process and materials													
E	Determine enrollment process												

R	Develop student identification plan including eligibility requirements												
E	Create engaging messaging												
E	Develop enrollment and consent forms and translate materials into appropriate languages												
R	Develop recruitment packages for staff who play an essential role in outreach and recruitment (e.g., registration and outreach materials for planned family communications, such as mailers, talking points for outreach calls, personalized outreach, etc.)												
E	Train school staff (e.g. attendance clerks) on process to manage summer enrollment on site												
E	Announce summer program dates												
E	Equip messengers, including providing information on enrollment process to school principals												
E	Update school website with summer program information												
E	Send first communication home with information on registration process and deadline												
Execute recruitment													
E	Distribute registration materials to schools												
E	Equip teachers or other designated recruitment specialists to conduct individualized outreach to eligible students and families												
R	Begin registration												
E	Facilitate phone calls to homes (robocalls or personalized)												
R	Send second communication home with registration deadline reminder												
E	Facilitate final reminder calls to families who have not registered yet (robocalls or personalized)												
R	Analyze test results to identify students who will be mandated to attend summer school for grade promotion (if applicable)												
E	Close registration												

Notify parents of enrollment status												
E	Send confirmation letters or postcards to families and students who enrolled, notifying them that their spot has been reserved											
E	Maintain waiting list and notify parents of enrollment if applicable											
E	Share behavior management policy, attendance expectations and incentives, and transportation schedule with students and families through pre-program mailer											
R	Make final reminder calls to families immediately prior to the program launch											
Outreach/engagement for retention												
R	Call parents of registered students who have not shown up to remind them of the program											
R	Send mid-program newsletter to families											
R	Send notification or reminder about culminating event(s) to families											
R	Send thank you letters to students and families											

E = Essential Task

R = Recommended Task

6. Staffing and Hiring

Why staffing and hiring are important

Among all aspects of planning and implementing a high-quality program, hiring the right staff can have the greatest impact on students' overall experience in the program. In [Getting to Work on Summer Learning, 2nd ed.](#), RAND found that teachers with strong content knowledge led classes that were more effective and engaging. Those teachers were able to draw on their experience and extend lessons from the curricula guide and use instructional practices that increased student engagement, deepened critical thinking, and ensured students understood the material.

RAND also found that teachers' interactions with students, both in and out of the classroom, contributed significantly to the site climate. At sites with consistently positive site climate, researchers observed that "instructional and non-instructional staff members were kind to students and handled student misbehavior consistently and appropriately" throughout the day. It's important to design a hiring process that will help you recruit highly motivated staff and teachers with appropriate subject-matter and grade-level experience.

How to get started

Begin by determining staffing needs for all key positions, including central office staff, site leaders, teachers and enrichment instructors, and other staff. Consider the roles and responsibilities and level of experience of required for each position. Develop a hiring process with a timeline for outreach, application submission and review, candidate interviews, and selection and placement. Work with your teacher's union to identify and recruit teachers with relevant grade-level and subject-matter expertise.

Planning tips and recommendations

- ✓ For districts that run multiple programs over the summer, first identify individual program staffing needs and hiring timelines. Then, compare across programs to streamline processes where possible.

- ✓ Include information about position duties and responsibilities, schedule, qualifications, and compensation in [job descriptions](#).
- ✓ Gain buy-in from district leadership and teacher's union (if applicable) on time commitment and selection process for key positions.
- ✓ Work with teacher's union to identify and recruit teachers who have grade-level and subject-matter experience and previous experience with students when possible.
- ✓ Set a deadline for hiring all staff that allows adequate time for professional development.
- ✓ Recruit principals of schools selected as summer sites to stay on as summer program site leads. This consistency in site leadership helps to ensure smooth program operations.
- ✓ Volunteers are a great way to increase program capacity. Identify operating and instructional needs that volunteers could support, and develop a process to recruit, train, and manage volunteers.

Staffing and Hiring													
KEY ACTIVITIES & TASKS		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Determine staffing needs and hiring timeline													
E	Define roles and responsibilities for site-level leadership related to program planning and implementation												
E	Determine staffing needs for instructional positions and additional staff (e.g., classroom support, special education, nurses, custodians, etc.)												
E	Determine hiring timeline for key positions including seasonal central office staff, site leadership, and teachers												
E	Develop hiring and selection process for central office and site leadership, including application requirements and review rubric												
E	Establish rate of pay for all summer program staff, including stipends for participation in professional development												

E	Negotiate, update and sign union MOU that describes requirements of teachers and staff and the selection and hiring process												
E	Coordinate hiring process with district staff managing payroll and district hiring system												
E	Develop hiring and selection process for teachers, including application requirements and review rubric												
E	Develop hiring and selection process for additional staff including application requirements and review rubric												
R	Develop process for tracking candidates and re-staffing position vacancies from waiting list (if/when need arises)												
Recruit or identify and hire site leads													
R	Identify and connect with staff from prior years who are encouraged to return												
E	Develop job descriptions for site leads												
E	Promote positions to eligible staff through district communication vehicles and personalized outreach												
E	Review applications												
E	Interview top candidates												
E	Make offers and secure commitments												
Recruit / identify and hire seasonal central office staff													
R	Identify and connect with staff from prior years identified to return												
E	Develop job descriptions for seasonal central office staff												
E	Promote positions to eligible staff through district communication vehicles and personalized outreach												
E	Review applications												
E	Interview top candidates												
E	Make offers and secure commitments												
Recruit or select and hire teachers													
R	Identify and connect with staff from prior years who are encouraged to return												
E	Review teacher applications												

E	Interview top candidates for teaching positions											
E	Make selection decisions, including assigning teachers to schools, subject areas, and grade levels according to experience											
E	Make offers and secure commitments from selected teachers											
Recruit or select and hire other essential staff												
E	Meet with district departments regarding additional staff needs to identify positions and select staff (e.g. health services, food service, etc.)											
E	Manage the process for confirming staff for these positions											

E = Essential Task

R = Recommended Task

7. Curriculum

Why curriculum is important

RAND found that adopting a common written curriculum for English language arts and mathematics that matches students' academic needs and abilities is necessary for high-quality instruction. Such a curriculum provides teachers with the building blocks they need to be successful within the classroom and is essential for summer programs, which typically include very little time for teacher planning. **Selecting and modifying curriculum** for use in summer learning programs is a major decision that creates both opportunities and challenges for program administrators and teachers, including how to maximize academic benefit in a short amount of time. Summer is also ripe with opportunity for exploration and is often used to implement new or innovative learning models.

Choosing the right curriculum is just the first step. RAND found that the right curriculum is necessary but not sufficient to ensure high-quality instruction. Programs must also support teachers by preparing lesson guides and equipping sites with the necessary materials and supplies.

How to get started

Begin by setting program goals for student outcomes. Then, determine if you need to find or develop new curriculum or if you can revise existing curriculum. Next, assess what materials you already have and what additional supplies or materials sites and teachers will need for quality instruction.

Planning tips and recommendations

- ✓ Consider alignment of summer curriculum with school year curriculum.
- ✓ Develop pacing guides to reflect priorities for instructional time with suggested time allocations for various components of each day's lesson, including scheduled transition times.

- ✓ Identify differentiation strategies within curricular materials to accommodate a minimum of two ability levels. Allow time for remediation.
- ✓ Ensure all materials necessary to train teachers in curriculum are available no later than one week prior to training.
- ✓ Ensure all curricula and related materials arrive onsite no later than one week prior to the program launch.

Curriculum		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
KEY ACTIVITIES & TASKS													
Select, identify, or develop curriculum													
E	Set program goals for student outcomes												
E	Identify staff to lead curriculum process												
E	Request and provide curriculum team with first quarter reading and math data to assess student needs												
R	Review commercially available and evidence-based curriculum and determine if curriculum aligned with program goals needs to be selected, developed, or revised												
R	If program requires use of specific student assessment data for grouping or instructional purposes, schedule pre-assessment prior to program launch												
E	If curriculum is computer-based, engage IT to identify technology needs and coordinate support leading up to and throughout the program												
Develop new or revise existing pacing guides and lesson plans													
E	Review student achievement data (winter benchmark) to determine student needs, including remediation												

E	Draft or revise pacing guides and lesson plans to provide sufficient guidance to teachers												
E	Finalize pacing guides and lesson plans to address district specific decisions and needs related to groupings, differentiation, instruction for students with IEP's, etc.												
Identify curriculum materials needs and order supplies													
R	Complete an inventory of available curriculum materials and determine what is still needed for the program												
R	Order additional materials and supplies												
Organize and deliver curriculum materials													
R	Print and prepare program developed curriculum (e.g. lesson plans)												
R	Organize all materials for easy pick-up and use												

E = Essential Task

R = Recommended Task

8. Enrichment

Why enrichment is important

Researchers and practitioners alike consider offering a range of fun activities to be an effective strategy for maximizing summer program participation. It is also an important way to reduce the income-based opportunity gap during the summer. RAND found that quality enrichment was key to creating fun and enjoyable days for students. High-quality enrichment classes included activities that were organized, engaging, and allowed for a majority of students to actively participate for the duration of the class period.

Using an RFP or application process can help ensure you recruit providers and instructors with aligned goals and a shared vision for high-quality implementation. A **partner MOU** clarifies roles and responsibilities and outlines planning and implementation expectations. Observing and providing feedback to enrichment instructors throughout the program can help you troubleshoot any challenges related to quality or alignment with program goals.

How to get started

Enrichment models can take many forms; your district may choose to partner with one organization to plan and lead all enrichment programming or engage multiple providers to lead different activities across the program. Some schools and community-based organizations jointly apply to collaboratively plan and run programs within a district. Begin by determining how enrichment programming will help you meet your overall program goals. Consider which of your existing partners or other high-quality providers in your community may be the right fit for your program.

Develop a process and timeline for recruitment that will bring in high-quality partners and instructors with the necessary experience and capacity. This may include an application that asks providers to describe their programming and how it aligns with your program's vision for quality and student success.

Planning tips and recommendations

- ✓ Hold a pre-bid meeting with interested enrichment partners and/or instructors to provide an overview of the program, provider expectations, and the application and selection process.
- ✓ Include prompts related to activity goals, strategies for grouping students, and scope and sequence for the entire program in your request for proposals.
- ✓ In the winter, survey students on their interest in enrichment activities and field trips.
- ✓ Include enrichment providers in program planning beginning in late winter/early spring.
- ✓ Plan field trips that connect with program content and goals.
- ✓ Confirm field trips with host sites at least one month prior to the field trip date.
- ✓ Beginning in April, share program updates and information through regular emails with partners.

Enrichment													
KEY ACTIVITIES & TASKS		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Recruit or select and contract with enrichment partners, providers, or staff													
E	Identify goals and expectations for enrichment programming												
E	Determine process for recruiting, selecting and hiring enrichment partners and/or instructors, and if this process will be managed by the district, site leaders, and/or partners												
E	Develop RFP to solicit enrichment partners (if applicable) including program information, application and contract process, and partner expectations (e.g. planning, operations, data-sharing, etc.)												

E	Develop review rubric for evaluating proposals from prospective partners											
E	Develop position descriptions and application for enrichment instructors											
E	Disseminate RFP and/or position descriptions to prior partners and enrichment instructors											
R	Reach out to promising organizations and/or individuals to encourage them to submit a proposal or apply											
R	Determine committee to review proposals and/or applications (if applicable)											
R	Receive and evaluate proposals and/or applications											
E	Select partners and/or instructors (if applicable)											
R	Receive approval of enrichment partners and/or instructors from district leadership or Board (if applicable)											
E	Develop agreements or MOUs with providers that includes roles, responsibilities, and resource allocation											
Plan for quality enrichment												
R	Identify goals and expectations for field trip experiences											
E	Determine number of field trips and whether there will be a culminating event											
E	Identify field trip locations											
E	Confirm field trip schedule											
E	Determine and secure transportation for field trips											
R	Develop mechanism for providing enrichment providers with feedback about their programming											
R	Hold a program orientation meeting with enrichment providers and review expectations for developing and submitting activity plans											
E	Conduct background checks on non-district employees											
R	Brief central office and site leadership staff on enrichment providers											
E	Communicate expectations for staff roles on field trips and during culminating events											
R	Hold facilities walk-through with enrichment partners											

R	Collect activity plans from enrichment partners											
R	Provide feedback on activity plans to enrichment partners											
R	Invite families to field trips and culminating events, as appropriate											

E = Essential Task

R = Recommended Task

9. Professional Development

Why professional development is important

High-quality staff are critical to maximizing student achievement and creating a positive program climate, but recruiting the right program leaders, teachers, staff, and enrichment providers is just the first step. Success hinges on offering all staff and enrichment providers **training and ongoing support** to effectively use instructional time, support positive behaviors and relationships with students, reinforce program culture and values, and efficiently manage day-to-day operations.

How to get started

Begin by identifying the content areas that will need to be addressed in training, including program goals, curriculum and instruction, behavior management, site operating procedures, etc. Determine necessary training for enrichment partners. Set a schedule for professional development, considering other school-year district events or training to avoid conflicts for teachers and other staff.

Planning tips and recommendations

- ✓ Gain buy-in from district leadership on professional development plan.
- ✓ Ensure connection between professional development lead and curriculum lead so that professional development addresses critical components of curriculum, including differentiation and instructional strategies.
- ✓ Plan joint professional development sessions with academic teachers and enrichment staff.
- ✓ Include opportunities for all instructional staff to practice using curriculum, observe model lessons, and practice delivering the curriculum.
- ✓ Ensure enrichment partners receive training on the program's policies and operations, with a particular focus on the behavior management system.

- ✓ Facilitate professional development at least one week prior to the program start date.
- ✓ Ensure that professional development emphasizes the importance of maximizing instructional time.
- ✓ If available, share student data during professional development to inform instruction.

Professional Development													
KEY ACTIVITIES & TASKS		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Plan professional development													
E	Identify lead(s) and individuals for professional development planning team												
E	Set schedule and topics for professional development planning meetings												
E	Identify specific content for professional development for all instructional staff (teachers and enrichment providers), including curriculum, behavior management, and program policies and operations, and identify where outside expertise is needed												
E	Develop professional development plan, including differentiation by staff roles												
E	Identify professional development providers (if needed)												
R	Confirm schedule for other district events to ensure professional development does not conflict with other trainings or activities												
E	Confirm location and professional development logistics, including materials and technology needs												
E	Share professional development schedule with sites												
R	Develop plan for providing instructional support once the program begins												

Implement Professional Development												
E	Provide orientation and training for all professional development providers, including teachers and instructional staff who will lead components of site-level trainings											
E	Deliver materials necessary for professional development to training sites, including curriculum, lesson plans, program policies or handbooks, etc.											
E	Conduct professional development on curriculum for all teachers											
R	Hold site-level orientation for all staff (academic and enrichment) to review and discuss site logistics, culture and climate, behavior system, and operating procedures											

E = Essential Task

R = Recommended Task

10. Site Operations and Culture

Why site operations and culture are important

In [Getting to Work on Summer Learning, 2nd ed.](#), RAND researchers emphasize that site management directly influences the daily experiences and learning of students. Setting policies and procedures with clear expectations and protocols for staff and student attendance, behavior management, and program culture and climate help reduce site disorganization that can disrupt instructional time. To make sure everyone is on the same page, program leaders should articulate standards to staff and families through program communications, manuals, trainings, and orientations.

How to get started

Begin by considering program goals and values to define the culture and climate you want to create for your program. Explore how day-to-day operations and expectations for student and staff engagement can support that climate and how you can encourage those standards through policies, procedures, and program incentives.

Planning tips and recommendations

- ✓ Assign responsibilities for developing and overseeing policies and procedures related to attendance, behavior, and culture to the district or individual sites. Or, assign shared responsibility, depending on the program model.
- ✓ Provide teachers and enrichment partners with a discipline action flow chart.
- ✓ Ensure both teachers and enrichment partners receive training on behavior management.
- ✓ Identify opportunities to incorporate youth voice and leadership into program planning and throughout the summer.
- ✓ Identify ways to incorporate program culture through décor, rituals and traditions, and field trips.
- ✓ Consider establishing program principles and an overarching program theme to communicate program values and aspirations, and

build a warm and caring environment.

- ✓ Communicate policies and procedures to staff through program manuals, professional development, and site-level orientation.
- ✓ For sites operating co-located programs, consider establishing site-wide policies when possible to mitigate conflicts or disruptions between programs. Provide program leaders with information on all co-located programs including schedules and program-specific policies and procedures.

Site Operations and Culture													
KEY ACTIVITIES & TASKS		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Define program culture and operating policies and procedures													
E	Develop or update student and staff attendance policies												
E	Define expectations for program culture and classroom climate that communicate program values and aspirations												
R	Develop or update behavior management policies that include expectations, infractions, and steps staff should take for each level of infraction												
R	Develop or update student attendance incentive plan												
R	Update and finalize program manual												
Prepare site management procedures													
E	Coordinate with IT to develop or adapt school-year tracking systems for the summer program												
E	Develop process to submit daily attendance												
E	Share student attendance tracking process and behavior management procedures with site leadership, if applicable												
R	Assign one person per site to oversee implementation of behavior management procedures												

E	Use student rosters to create attendance tracking system											
R	Produce materials and décor to brand program space											
E	Coordinate process for collecting health forms in collaboration with school-year nurses and/or district personnel in charge of oversight											
E	Develop process for tracking staff attendance and hourly payroll											
E	Review all operating policies and procedures during staff professional development and onsite orientation											

E = Essential Task

R = Recommended Task

11. Schedules and Rosters

Why schedules and rosters are important

A successful day in a summer program, one where staff and students accomplish all they have set out to do, is dependent upon buses arriving on time, classes starting and ending on time, students and teachers knowing where to go, and meals being provided as planned. If not properly planned and staffed, daily transitions for meals, bathroom breaks, and class rotations can disrupt the program schedule and take away critical time for instruction and enrichment. **Site schedules** create routines for staff and students that enable them to focus less on logistics and more on learning and enrichment. Class and student rosters also help site leaders locate students and staff quickly if needed.

How to get started

Begin by determining the balance of academic and enrichment instruction that needs to be provided daily to meet your program goals. Next, consider the culture and climate you want to create and how you will build in daily activities and rituals to support building an engaging program culture. Consider the layout of your facility and the time needed for students to move between activities throughout the day to ensure appropriate time for breaks and transitions.

Planning tips and recommendations

- ✓ Schedule classes to occur in one continuous block to ensure transitions, lunch, snack, and special events do not break up or take away from academic instruction.
- ✓ Include bathroom breaks in the site schedule.
- ✓ Consider activity needs (e.g. A/V, access to outdoors, air conditioning, etc.) when identifying program rooms and spaces.
- ✓ Consider the distance between all program areas and key amenities (e.g. bathrooms) and group sequential activities in similar areas to minimize transition time and disruptions.

Schedules and Rosters		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
KEY ACTIVITIES & TASKS													
Develop program schedule													
E	Develop program schedule, including start and end dates and overall program structure with appropriate time for academic instruction												
Develop and share site schedules													
E	Develop consistent daily schedule including time for transitions and breaks												
E	Assign rooms and program spaces for all classes and enrichment activities												
E	Share site schedules with site leaders and teachers												
E	Share program schedule with students and families												
Develop and share class schedules													
R	Complete student groupings based on academic needs and enrichment interests												
R	Develop classroom-level schedules for students within a group or class												
E	Provide class rosters to site leaders and teachers												

E = Essential Task

R = Recommended Task

12. Transportation

Why transportation planning is important

Ensuring smooth and efficient transportation for students to and from the program is critical to program success. Late arrivals increase disorganization at the site and disrupt important instructional time. Most summer programs operate an average of 25-30 days, so you can't afford to lose even a day to transportation issues. It's important to test-run your routes prior to the program's first day. Additionally, providing families with clear information about the schedule and location for their pick-up, and reminders up to the first day, helps make sure every student has an easy first day.

How to get started

Begin by determining all of your transportation needs, including feeder patterns, anticipated number of students per site, offsite program field trips, and accommodations for students with special needs. Consider your program schedule to set arrival and departure times.

Planning tips and recommendations

- ✓ Coordinate a practice run prior to the start of the program to ensure smooth pick-ups and arrivals on the first day.
- ✓ Coordinate with appropriate departments to identify students in need of door-to-door transportation.
- ✓ Ensure that every student is included on a bus route or is noted as a walker.
- ✓ Ensure that operations managers are equipped to respond to parent calls regarding transportation.
- ✓ Develop a systematic way to share transportation information with families such as specific mailers and robo calls.
- ✓ Re-confirm transportation schedule for field trips with vendor prior to each offsite activity.

Transportation		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
KEY ACTIVITIES & TASKS													
Coordinate transportation													
R	Hold initial planning meeting with transportation department to debrief prior summer program and establish communication and coordination plan for upcoming summer												
E	Determine transportation needs including transporting students to and from the program, field trips, and other events												
E	If applicable, secure transportation vendor												
R	Designate a site leader to manage transportation for the entire site												
E	Identify appropriate pick-up and drop-off locations												
E	Meet with transportation department or vendor to begin scheduling routes and determining cost estimates												
E	Develop a process for arrivals and dismissals at each site												
E	Arrange field trip transportation												
E	Finalize transportation master plan												
Execute transportation													
E	Receive bus routes from transportation department or vendor												
R	Conduct transportation test run												
E	Provide transportation routes to site leaders												
E	Provide student roster for each site to transportation department or vendor												
E	Oversee transportation and troubleshoot challenges as needed												

E = Essential Task

R = Recommended Task

13. Meals

Why meal planning is important

A summer meals plan includes projecting and preparing for food delivery, preparation, and service across all sites. Individual site plans ensure smooth program operations and minimize delays or disruptions to instructional time.

How to get started

In early winter, predict student numbers for each site and meet with the food services department to discuss logistics. Once you've established program schedules and confirmed enrollment capacity, you can begin working on the detailed service plan for each site.

Planning tips and recommendations

- ✓ Consider attrition within project enrollment and use historic average daily attendance rates (ADA) to more accurately project number of anticipated students at each site; if you don't have historic data, assume a 75% ADA.
- ✓ Review program schedule to confirm that meal and snack times do not break up instructional blocks.

Meals		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
KEY ACTIVITIES & TASKS													
Coordinate food service													
R	Hold initial planning meeting with food services to debrief prior summer program and establish communication and coordination plan for upcoming summer												
E	Provide food service department with school locations and projections for each site												
E	Hold planning meeting with food services to review summer program plans including number and location of sites, number of anticipated students at each site, meal times, etc.												
E	Finalize food service master plan												
Coordinate and execute food service at each summer program site													
E	Establish meal times for each site												
E	Receive and review draft menus to confirm meal plan												
E	Distribute final menus to sites												

E = Essential Task

R = Recommended Task

14. Supplies

Why supply planning is important

Districts often have limited time between when the school year ends and the summer program begins. An organized approach for ordering, distributing, and managing supplies at individual sites helps site leaders and teachers quickly prepare and kick off the program with everything they need.

How to get started

Begin by going through the curriculum and program schedule (including field trips) to brainstorm all the supplies and materials that are necessary to operate the program. Then, compare existing inventory with needs to determine gaps. Plan to order supplies 2-3 months prior to the program launch and store everything centrally.

Planning tips and recommendations

- ✓ Ensure your supply list includes basic building supplies, custodial supplies, and nursing supplies.
- ✓ Ensure supplies are delivered at least one week prior to start of the program.
- ✓ If the summer site leader is different than during the school year, wait until the summer leader is onsite to deliver supplies.

Supplies		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
KEY ACTIVITIES & TASKS													
Determine supply needs													
E	Determine supply needs by reviewing plans, surveying staff from previous years, and checking against curricular, enrichment, and field trip needs												
E	Complete an inventory of existing supplies												
E	Ask central office and site leadership for additional supply requests												
E	Prepare supply orders												
Order, organize and deliver supplies to sites													
E	Order supplies												
R	Develop schedule for distribution												
E	Determine where supplies will be stored at sites prior to program launch												
E	Provide site leadership with materials list and distribution instructions												
E	Inventory materials and supplies to ensure all ordered supplies were received												
E	Organize supplies for site distribution												
E	Deliver supplies to all sites												
Manage supplies during and after the program													
E	Determine process for purchasing necessary supplies during the summer program												
R	Provide technology and equipment inventory for site leaders and principals to develop process for check out and return												
R	Develop process for end-of-summer supply return and inventory												
E	Collect and inventory supplies at the end of the program												

E = Essential Task

R = Recommended Task

PLANNING CATEGORIES – COMPLETE MONTH-BY-MONTH VIEW

PLANNING AND MANAGEMENT

KEY ACTIVITIES & TASKS		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Outline cross-departmental leadership structure for planning													
E	Confirm staff lead to oversee summer program planning												
E	Define roles and responsibilities for district, site leadership, and partner staff related to program planning and implementation												
E	Develop system to coordinate and track planning												
E	Determine members of planning team												
Determine planning process and timeline													
R	Develop monthly planning schedule with key tasks, monthly deadlines, and who's responsible (including district, site leadership, and partner staff)												
R	Identify planning expectations (responsibilities, meeting schedule) for all staff to include in job descriptions												
R	Identify planning expectations (responsibilities, meeting schedule) for all partners to include in partner agreements												
R	Collect feedback on the delineation of roles and responsibilities for planning, program management, and evaluation during annual debrief with district staff, site leadership, and partners												
Facilitate regular planning meetings													

E = Essential Task

R = Recommended Task

CONTINUOUS IMPROVEMENT PROCESS

KEY ACTIVITIES & TASKS		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Develop new or refine existing program evaluation plan													
R	Begin to discuss the evaluation plan for next summer												
R	Define or update program goals and expected outcomes												
R	Finalize program evaluation plan including systems and processes for data collection, analysis, dissemination, and application												
E	Determine data sharing requirements and include relevant language in partner MOUs												
E	Select or develop assessments to measure program quality and student outcomes (e.g. youth academic and social emotional skills; instructional quality; effectiveness of professional development; and participant, staff and stakeholder satisfaction, etc.)												
E	Develop mechanism to monitor fidelity of curriculum and enrichment implementation												
Use data to inform instruction and program development													
R	Share end-of-summer data from previous summer with program stakeholders												
E	Conduct debrief with planning team and examine data from previous summer to identify improvements for next summer												
R	Collect spring reading and math data to form class groupings by ability levels												
R	Provide data in an easily accessible format to classroom teachers												
Execute evaluation													
R	Collect and analyze fall student testing data and compare to previous spring testing data to assess student and program outcomes from the previous summer program												

R	Administer pre-assessments according to schedule (e.g. spring school-year assessments or in-program skills pre-assessment)												
E	Collect and analyze student daily attendance data												
E	Observe academic and enrichment instruction and provide feedback to staff during and at the end of the program												
R	Conduct end-of-program assessment (if applicable)												
R	Conduct focus groups to gather feedback from key stakeholders including students, families, staff and partners												
E	Analyze collected data												
E	Develop list of students that met promotion criteria (if applicable)												
R	Begin to prepare end-of-summer data reports on enrollment, attendance, program quality, student outcomes, and satisfaction surveys (staff, student, families, and partners) for various stakeholder groups, including principals												

E = Essential Task

R = Recommended Task

PROGRAM BUDGET

KEY ACTIVITIES & TASKS		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Prepare budget for summer program													
E	Estimate budget based on prior year budget and actual expenditures												
R	Schedule regular meetings with finance or other administration to periodically review budgets												
E	Determine primary costs for each site including personnel, facilities, meals, transportation, materials and supplies, and administrative and overhead costs												
E	Discuss budget estimates with district leadership												
E	Confirm existing federal, state, local, district, and philanthropic funds that will support the program												
E	Identify revenue gaps and operating categories that require additional funding												
E	Present draft budget to district leadership for approval												
E	Confirm budget to operate each summer site and update budget draft												
E	Engage the leadership planning team to review the updated draft budget												
E	Finalize program budget												
Plan for program sustainability													
R	Identify potential funding sources to support program growth and sustainability												
R	Prepare fundraising materials including case statements, proposals, budgets, impact data, etc.												
R	Confirm new funding, update budgets and revenue sources, and develop plan for managing funding based on requirements												

Manage and reconcile budget regularly												
E	Develop payment process for enrichment partners and vendors											
E	Develop process to manage and track expenditures against budget											
E	Process final expenses and payments											
E	Reconcile all expenditures against budget											
E	Prepare financial reports for district/community leaders and program funders											

E = Essential Task

R = Recommended Task

FACILITIES

KEY ACTIVITIES & TASKS		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Identify sites for summer program													
R	Develop list of targeted sites to host summer programs												
E	Meet with directors of facilities and custodial services to review building capacity and capital improvements or construction planned for the summer												
E	Research city and school district summer permitting processes, if applicable												
R	Create a preliminary projection of the number of students that will attend each site												
E	Confirm dates for summer program based on school calendar and facilities availability												
E	Confirm sites and available classrooms for summer program												
E	Identify contacts for facilities, equipment, etc., at each site												
R	Develop written agreement that describes how the sites will be used												
E	Notify school year principals of site selection and requirements for hosting summer program												
E	Determine feeder patterns, if applicable												
Prepare sites for program implementation													
R	Conduct meetings between summer site principals and school-year principals to discuss facility needs, emergency plans, bus drop-off locations, etc.												
E	Coordinate with district (and/or city if appropriate) to ensure school zones operate during the summer and that crossing guards are available at all locations												
R	Conduct site walk-throughs												

R	Develop safety plan for summer site principals to share with staff during professional development											
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E = Essential Task
R = Recommended Task



STUDENT RECRUITMENT

KEY ACTIVITIES & TASKS		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Develop intentional marketing and recruitment strategies													
R	Identify all audiences with whom you need to communicate (e.g. priority families and students for recruitment)												
R	Identify strategies for successfully reaching each of your target audiences												
R	Develop a timeline for all outreach and recruitment activities												
R	Develop strategies to measure success												
Prepare student identification and recruitment process and materials													
E	Determine enrollment process												
R	Develop student identification plan including eligibility requirements												
E	Create engaging messaging												
E	Develop enrollment and consent forms and translate materials into appropriate languages												
R	Develop recruitment packages for staff who play an essential role in outreach and recruitment (e.g., registration and outreach materials for planned family communications, such as mailers, talking points for outreach calls, personalized outreach, etc.)												
E	Train school staff (e.g. attendance clerks) on process to manage summer enrollment on site												
E	Announce summer program dates												
E	Equip messengers, including providing information on enrollment process to school principals												

E	Update school website with summer program information											
E	Send first communication home with information on registration process and deadline											
Execute recruitment												
E	Distribute registration materials to schools											
E	Equip teachers or other designated recruitment specialists to conduct individualized outreach to eligible students and families											
R	Begin registration											
E	Facilitate phone calls to homes (robocalls or personalized)											
R	Send second communication home with registration deadline reminder											
E	Facilitate final reminder calls to families who have not registered yet (robocalls or personalized)											
R	Analyze test results to identify students who will be mandated to attend summer school for grade promotion (if applicable)											
E	Close registration											
Notify parents of enrollment status												
E	Send confirmation letters or postcards to families and students who enrolled, notifying them that their spot has been reserved											
E	Maintain waiting list and notify parents of enrollment if applicable											
E	Share behavior management policy, attendance expectations and incentives, and transportation schedule with students and families through pre-program mailer											
R	Make final reminder calls to families immediately prior to the program launch											
Outreach/engagement for retention												
R	Call parents of registered students who have not shown up to remind them of the program											

R	Send mid-program newsletter to families												
R	Send notification or reminder about culminating event(s) to families												
R	Send thank you letters to students and families												

E = Essential Task

R = Recommended Task

STAFFING AND HIRING

KEY ACTIVITIES & TASKS		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Determine staffing needs and hiring timeline													
E	Define roles and responsibilities for site-level leadership related to program planning and implementation												
E	Determine staffing needs for instructional positions and additional staff (e.g., classroom support, special education, nurses, custodians, etc.)												
E	Determine hiring timeline for key positions including seasonal central office staff, site leadership, and teachers												
E	Develop hiring and selection process for central office and site leadership, including application requirements and review rubric												
E	Establish rate of pay for all summer program staff, including stipends for participation in professional development												
E	Negotiate, update and sign union MOU that describes requirements of teachers and staff and the selection and hiring process												
E	Coordinate hiring process with district staff managing payroll and district hiring system												
E	Develop hiring and selection process for teachers, including application requirements and review rubric												
E	Develop hiring and selection process for additional staff including application requirements and review rubric												
R	Develop process for tracking candidates and re-staffing position vacancies from waiting list (if/when need arises)												
Recruit or identify and hire site leads													
R	Identify and connect with staff from prior years who are encouraged to return												
E	Develop job descriptions for site leads												

E	Promote positions to eligible staff through district communication vehicles and personalized outreach												
E	Review applications												
E	Interview top candidates												
E	Make offers and secure commitments												
Recruit / identify and hire seasonal central office staff													
R	Identify and connect with staff from prior years identified to return												
E	Develop job descriptions for seasonal central office staff												
E	Promote positions to eligible staff through district communication vehicles and personalized outreach												
E	Review applications												
E	Interview top candidates												
E	Make offers and secure commitments												
Recruit or select and hire teachers													
R	Identify and connect with staff from prior years who are encouraged to return												
E	Review teacher applications												
E	Interview top candidates for teaching positions												
E	Make selection decisions, including assigning teachers to schools, subject areas, and grade levels according to experience												
E	Make offers and secure commitments from selected teachers												
Recruit or select and hire other essential staff													
E	Meet with district departments regarding additional staff needs to identify positions and select staff (e.g. health services, food service, etc.)												
E	Manage the process for confirming staff for these positions												

E = Essential Task

R = Recommended Task

CURRICULUM

KEY ACTIVITIES & TASKS		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Select, identify, or develop curriculum													
E	Set program goals for student outcomes												
E	Identify staff to lead curriculum process												
E	Request and provide curriculum team with first quarter reading and math data to assess student needs												
R	Review commercially available and evidence-based curriculum and determine if curriculum aligned with program goals needs to be selected, developed, or revised												
R	If program requires use of specific student assessment data for grouping or instructional purposes, schedule pre-assessment prior to program launch												
E	If curriculum is computer-based, engage IT to identify technology needs and coordinate support leading up to and throughout the program												
Develop new or revise existing pacing guides and lesson plans													
E	Review student achievement data (winter benchmark) to determine student needs, including remediation												
E	Draft or revise pacing guides and lesson plans to provide sufficient guidance to teachers												
E	Finalize pacing guides and lesson plans to address district specific decisions and needs related to groupings, differentiation, instruction for students with IEP's, etc.												
Identify curriculum materials needs and order supplies													
R	Complete an inventory of available curriculum materials and determine what is still needed for the program												
R	Order additional materials and supplies												

Organize and deliver curriculum materials												
R	Print and prepare program developed curriculum (e.g. lesson plans)											
R	Organize all materials for easy pick-up and use											

E = Essential Task

R = Recommended Task

ENRICHMENT

KEY ACTIVITIES & TASKS		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Recruit or select and contract with enrichment partners, providers, or staff													
E	Identify goals and expectations for enrichment programming												
E	Determine process for recruiting, selecting and hiring enrichment partners and/or instructors, and if this process will be managed by the district, site leaders, and/or partners												
E	Develop RFP to solicit enrichment partners (if applicable) including program information, application and contract process, and partner expectations (e.g. planning, operations, data-sharing, etc.)												
E	Develop review rubric for evaluating proposals from prospective partners												
E	Develop position descriptions and application for enrichment instructors												
E	Disseminate RFP and/or position descriptions to prior partners and enrichment instructors												
R	Reach out to promising organizations and/or individuals to encourage them to submit a proposal or apply												
R	Determine committee to review proposals and/or applications (if applicable)												
R	Receive and evaluate proposals and/or applications												
E	Select partners and/or instructors (if applicable)												
R	Receive approval of enrichment partners and/or instructors from district leadership or Board (if applicable)												
E	Develop agreements or MOUs with providers that includes roles, responsibilities, and resource allocation												

Plan for quality enrichment												
R	Identify goals and expectations for field trip experiences											
E	Determine number of field trips and whether there will be a culminating event											
E	Identify field trip locations											
E	Confirm field trip schedule											
E	Determine and secure transportation for field trips											
R	Develop mechanism for providing enrichment providers with feedback about their programming											
R	Hold a program orientation meeting with enrichment providers and review expectations for developing and submitting activity plans											
E	Conduct background checks on non-district employees											
R	Brief central office and site leadership staff on enrichment providers											
E	Communicate expectations for staff roles on field trips and during culminating events											
R	Hold facilities walk-through with enrichment partners											
R	Collect activity plans from enrichment partners											
R	Provide feedback on activity plans to enrichment partners											
R	Invite families to field trips and culminating events, as appropriate											

E = Essential Task

R = Recommended Task

PROFESSIONAL DEVELOPMENT

KEY ACTIVITIES & TASKS		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Plan professional development													
E	Identify lead(s) and individuals for professional development planning team												
E	Set schedule and topics for professional development planning meetings												
E	Identify specific content for professional development for all instructional staff (teachers and enrichment providers), including curriculum, behavior management, and program policies and operations, and identify where outside expertise is needed												
E	Develop professional development plan, including differentiation by staff roles												
E	Identify professional development providers (if needed)												
R	Confirm schedule for other district events to ensure professional development does not conflict with other trainings or activities												
E	Confirm location and professional development logistics, including materials and technology needs												
E	Share professional development schedule with sites												
R	Develop plan for providing instructional support once the program begins												
Implement Professional Development													
E	Provide orientation and training for all professional development providers, including teachers and instructional staff who will lead components of site-level trainings												
E	Deliver materials necessary for professional development to training sites, including curriculum, lesson plans, program policies or handbooks, etc.												

E	Conduct professional development on curriculum for all teachers											
R	Hold site-level orientation for all staff (academic and enrichment) to review and discuss site logistics, culture and climate, behavior system, and operating procedures											

E = Essential Task

R = Recommended Task

SITE OPERATIONS AND CULTURE

KEY ACTIVITIES & TASKS		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Define program culture and operating policies and procedures													
E	Develop or update student and staff attendance policies												
E	Define expectations for program culture and classroom climate that communicate program values and aspirations												
R	Develop or update behavior management policies that include expectations, infractions, and steps staff should take for each level of infraction												
R	Develop or update student attendance incentive plan												
R	Update and finalize program manual												
Prepare site management procedures													
E	Coordinate with IT to develop or adapt school-year tracking systems for the summer program												
E	Develop process to submit daily attendance												
E	Share student attendance tracking process and behavior management procedures with site leadership, if applicable												
R	Assign one person per site to oversee implementation of behavior management procedures												
E	Use student rosters to create attendance tracking system												
R	Produce materials and décor to brand program space												
E	Coordinate process for collecting health forms in collaboration with school-year nurses and/or district personnel in charge of oversight												
E	Develop process for tracking staff attendance and hourly payroll												
E	Review all operating policies and procedures during staff professional development and onsite orientation												

E = Essential Task

R = Recommended Task

SCHEDULES AND ROSTERS

KEY ACTIVITIES & TASKS		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Develop program schedule													
E	Develop program schedule, including start and end dates and overall program structure with appropriate time for academic instruction												
Develop and share site schedules													
E	Develop consistent daily schedule including time for transitions and breaks												
E	Assign rooms and program spaces for all classes and enrichment activities												
E	Share site schedules with site leaders and teachers												
E	Share program schedule with students and families												
Develop and share class schedules													
R	Complete student groupings based on academic needs and enrichment interests												
R	Develop classroom-level schedules for students within a group or class												
E	Provide class rosters to site leaders and teachers												

E = Essential Task

R = Recommended Task

TRANSPORTATION

KEY ACTIVITIES & TASKS		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Coordinate transportation													
R	Hold initial planning meeting with transportation department to debrief prior summer program and establish communication and coordination plan for upcoming summer												
E	Determine transportation needs including transporting students to and from the program, field trips, and other events												
E	If applicable, secure transportation vendor												
R	Designate a site leader to manage transportation for the entire site												
E	Identify appropriate pick-up and drop-off locations												
E	Meet with transportation department or vendor to begin scheduling routes and determining cost estimates												
E	Develop a process for arrivals and dismissals at each site												
E	Arrange field trip transportation												
E	Finalize transportation master plan												
Execute transportation													
E	Receive bus routes from transportation department or vendor												
R	Conduct transportation test run												
E	Provide transportation routes to site leaders												
E	Provide student roster for each site to transportation department or vendor												
E	Oversee transportation and troubleshoot challenges as needed												

E = Essential Task

R = Recommended Task

MEALS

KEY ACTIVITIES & TASKS		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Coordinate food service													
R	Hold initial planning meeting with food services to debrief prior summer program and establish communication and coordination plan for upcoming summer												
E	Provide food service department with school locations and projections for each site												
E	Hold planning meeting with food services to review summer program plans including number and location of sites, number of anticipated students at each site, meal times, etc.												
E	Finalize food service master plan												
Coordinate and execute food service at each summer program site													
E	Establish meal times for each site												
E	Receive and review draft menus to confirm meal plan												
E	Distribute final menus to sites												

E = Essential Task

R = Recommended Task

SUPPLIES

KEY ACTIVITIES & TASKS		SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Determine supply needs													
E	Determine supply needs by reviewing plans, surveying staff from previous years, and checking against curricular, enrichment, and field trip needs												
E	Complete an inventory of existing supplies												
E	Ask central office and site leadership for additional supply requests												
E	Prepare supply orders												
Order, organize and deliver supplies to sites													
E	Order supplies												
R	Develop schedule for distribution												
E	Determine where supplies will be stored at sites prior to program launch												
E	Provide site leadership with materials list and distribution instructions												
E	Inventory materials and supplies to ensure all ordered supplies were received												
E	Organize supplies for site distribution												
E	Deliver supplies to all sites												
Manage supplies during and after the program													
E	Determine process for purchasing necessary supplies during the summer program												
R	Provide technology and equipment inventory for site leaders and principals to develop process for check out and return												
R	Develop process for end-of-summer supply return and inventory												
E	Collect and inventory supplies at the end of the program												

E = Essential Task

R = Recommended Task