SPSA Tool

User Manual

Contents

Contents

SPSA Tool

Pivot's LCAP & SPSA Tool (the Tool) was designed to support districts to complete their SPSA through a step by step process that helps schools examine, evaluate and increase the efficiency and effectiveness of school planning and budgeting, as well as the equity of resource allocation from the district to school sites.

The Tool Aligns the Planning and Budgeting Process

Implement
Begin implementation of school site plan:
- Training and PD calendar for staff
- Community Asset Mapping

Review and Revise
Needs Assessment:
- Student achievement*
- Community engagement*
Review Current Plan:
- Set goals*
- Develop strategies*

Summer **Fall**

Ongoing stakeholder engagement and data analysis

Spring **Winter**

Finalize
- Layoff notices
- Review budget and school site plan with stakeholders
- Submit school plan for final School Board approval*

Budget (for next school year):
- Identify resources*
- Prioritize expenditures*
- Draft a budget*
- Gain consensus with stakeholders
- Finalize staffing decisions

*Activities supported by the Tool

"He who fails to plan is planning to fail."
Winston Churchill

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About the Tool

Pivot Learning Partners' SPSA Tool facilitates a year-round school planning and budgeting process

- School staff evaluate student data and can record the findings in the Tool
- Users enter planning information, such as Goals, Strategies, Actions, and Expenditures
- The Tool supports prioritization of investments and budget planning
- A variety of reports are available at the click of a button, including the Single Plan for Student Achievement
- Links to training and support resources are available

Benefits of the Tool

- Connects the planning and budgeting process

- Facilitates transparency and stakeholder engagement

- Provides an online medium for sites to view each other's plans and to share best practices

- Enables a more effective and meaningful way of creating your Single Plan for Student Achievement (SPSA)
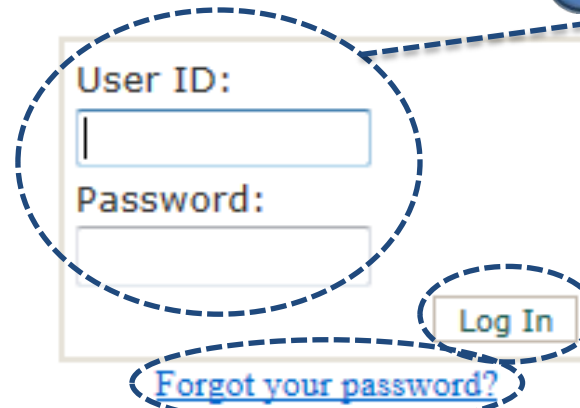
Login

1 Go to: www.edspending.org

2 Enter your User ID and Password from your account setup email

User ID:

Password:

Log In

Forgot your password?

3 Click Log In

4 If you do not remember your password, click on "Forgot your password?" and you will get an email with a new password which you can change after you log in
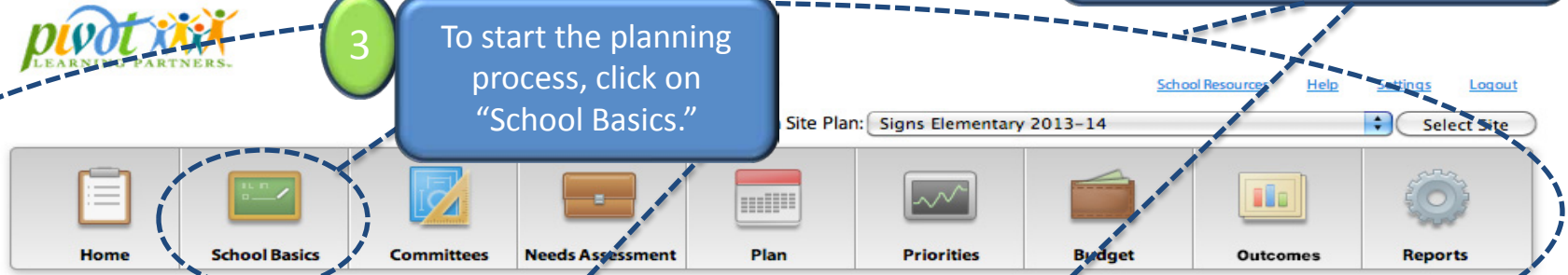
Home Page

School Basics

1

The upper part of the School Basics page includes Contact Information for your school. Click "Edit" to edit information if anything needs to be changed.

School Basics for Site Plan: Signs Elementary 2013-14

Continue to Committees

Contact Information   Edit

Site Plan Name	Signs Elementary 2013-14
School Year	2013-14
Address	123 Central Street
Address 2	
City	Oakland
State	California
Zip Code	94103
CDS Code	

School Name	Signs Elementary
Level	Elementary
Phone	510-512-6343
Email	contact@signs.k12.ca.us
Principal First Name	Bryce
Principal Last Name	Cooper
Contact First Name	Alice
Contact Last Name	Kirkland
Position	
Asst. Principal First Name	
Asst. Principal Last Name	

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School Basics (cont.)

2 Then click "Save" to save your changes or "Cancel" to revert to the original values.

1 Edit information in the Contact Information form as necessary.

Elementary 2013-14

Continue to Committees

Contact Information   Save   Cancel

Site Plan Name	Signs Elementary 2013-14	School Name	Signs Elementary
School Year	2013-14	Level	Elementary
Address	123 Central Street	Phone	510-512-6343
Address 2		Email	contact@signs.k12.ca.us
City	Oakland	Principal First Name	Bryce
State	California	Principal Last Name	Cooper
Zip Code	94103	Contact First Name	Alice
CDS Code		Contact Last Name	Kirkland
		Position	
		Asst. Principal First Name	
		Asst. Principal Last Name	

School Basics (cont.)

About Signs Elementary 2013-14

Edit

School Mission:
See example

Signs Elementary offers a rigorous academic program and a rich ~~s~~
community that is diverse, multicultural, and supportive. Pride at S~~i~~
and staff members in a learning environment whereby all students
improving their skills as Communicators, Achievers, Thinkers, and

School Vision:
See example

Students of Signs Elementary are productive members of society empowered to succeed in college and their profession.

School Profile:
See example

Local Measures:
See example

Edit

Continue to Committees

1 The lower part of this page includes additional information for your school, such as Mission, Vision, Profile, and Local Measures. Click "Edit" to edit information if anything needs to be changed.

School Basics (cont.)

1 Edit information in the Contact Information form as necessary.

About Signs Elementary 2013-14

Save   Cancel

School Vision:
See example

Signs Elementary offers a rigorous academic program and a rich selection of athletic and extracurricular opportunities set in a community that is diverse, multicultural, and supportive. Pride at Signs is developed, promoted, and nutured by teachers, administrators and staff members in a learning environment whereby all students are encouraged to strive toward common educational goals by improving their skills as Communicators, Achievers, Thinkers, and Socially Responsible Persons.

School Vision:
See example

Students of Signs Elementary are productive members of society empowered to succeed in college and their profession.

School Profile:
See example

2 Then click "Save" to save your changes or "Cancel" to revert to the original values.

3 Click "Continue to Committees" to go to the next step in the process.

Save   Cancel

Continue to Committees

Committees

Committee Members for Site Plan: Signs Elementary-2013-14

| 1 | Click "Add New Committee Member" to add a new committee member |

Add New Committee Member

Continue to Needs Assessment

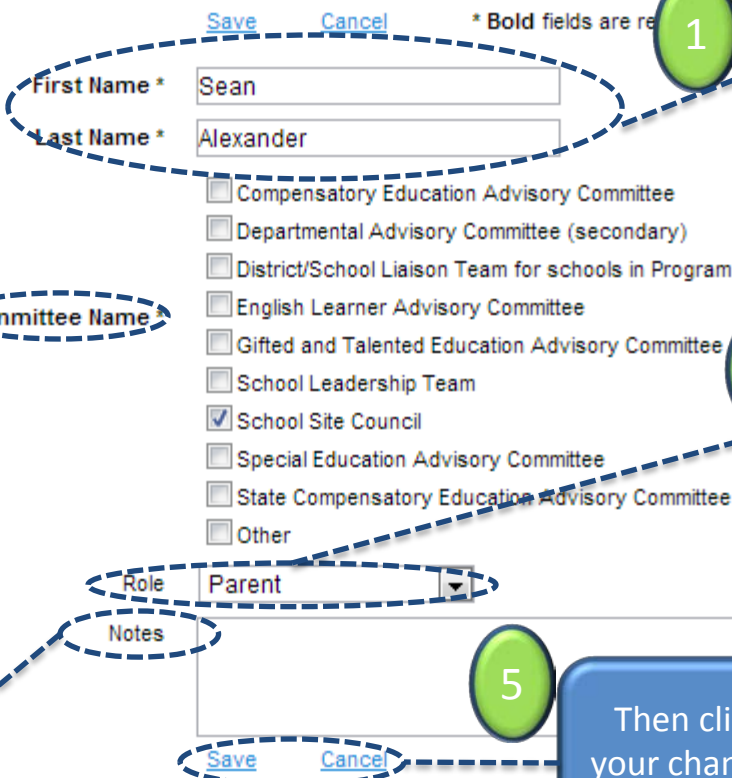|	First Name	Last Name	Committee Name	Role	Notes	
Edit	Sean	Alexander	School Site Council	Parent		Delete
Edit	Frank	Clinton	School Site Council	Community Member		Delete
Edit	Bryce	Cooper	School Site Council	Principal		Delete
Edit	Alice	Harrah	School Site Council	Classroom Teacher	Science teacher	Delete

Continue to Needs Assessment

| 2 | You can also click to edit the name or committees for an existing member |

Committees (cont.)

Edit Committee Member for Site Plan: Signs Elementary 2013-14

Save   Cancel   * **Bold** fields are re...

First Name *   Sean
Last Name *   Alexander

☐ Compensatory Education Advisory Committee
☐ Departmental Advisory Committee (secondary)
☐ District/School Liaison Team for schools in Program Improvement
☐ English Learner Advisory Committee

Committee Name *

☐ Gifted and Talented Education Advisory Committee
☐ School Leadership Team
☑ School Site Council
☐ Special Education Advisory Committee
☐ State Compensatory Education Advisory Committee
☐ Other

Role   Parent ▾

Notes

Save   Cancel

1 Enter the first and last name for the committee member

2 Identify the committees using the check boxes in the Committee Name section

3 Identify the role for the committee member by selecting an option from the drop down list

4 Enter Notes to add detail

5 Then click "Save" to save your changes or "Cancel" to revert to the original values

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Committees (cont.)

Committee Members for Site Plan: Signs Elementary 2013-14

| Add New Committee Member | | | | Continue to Needs Assessment |

	First Name	Last Name	Committee Name	Role	Notes	
Edit	Sean	Alexander	School Site Council	Parent		Delete
Edit	Frank	Clinton	School Site Council	Community Member		Delete
Edit	Bryce	Cooper	School Site Council	Principal		Delete
Edit	Alice	Harrah	School Site Council	Classroom Teacher	Science teacher	Delete

Continue to Needs Assessment

1 You can delete a committee member by clicking the Delete link

2 After you have added all committee members, click "Continue to Needs Assessment" to go to the next step in the process

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School Resources

1 The School Resources page is where you can upload school-specific resources that detail your school's data, as well as other information that might help you in your school planning. Any resources can be uploaded here as reference material.

2 You can upload your School Scorecard or other resource on the School Resources page. First, click "Browse…" to browse for the file you wish to upload.

3 After you've selected the file you wish to upload, click "Upload School Resource File" to upload the file.

School Resources for Site Plan: Signs Elementary 2013-14

1 - Use the Choose File button to select your School Resource -

[Choose File] No file chosen

2 - Then use the Upload School Resource File button to Upload your School Resource -

[Upload School Resource File]

School Resources (cont.)

1 After your files have been uploaded, you can edit the name of the document and the order in which it appears by clicking on "Edit."

3 You can view the uploaded file by clicking "View."

4 To delete the uploaded file, click "Delete" and then click "OK" in the dialog box that appears.

Uploaded School Resources

		Order	Document Type	Document Filename	
Edit	View	1	School Resource	School Scorecard 1.pdf	Delete
Save Cancel	View	2	School Resource	School Scorecard 2.pdf	Delete

2 Edit the information you wish to change, then click "Save" to save your changes or "Cancel" to revert to the original values.

Needs Assessment

Assess Needs for Site Plan: Signs Elementary 2013-14

The Needs Assessment includes questions to help you assess, alongside the analysis of school data, where your school stands now and what changes might need to be made to improve. This information corresponds to Form G in the Single Plan for Student Achievement. None of the fields are required.

Edit

Continue to Plan

1. Identify strategies that were fully implemented last year as described in your school's plan.

1

2. Identify strategies that were not fully implemented last year as described in your school's plan or were not implemented within the specific timelines.

2

2. a. What specific actions related to those strategies were eliminated or modified during the year?

2a

2. b. Identify barriers to full or timely implementation of the strategies identified above.

2b

2. c. What actions were undertaken to mitigate those barriers or adjust the plan to overcome them?

2c

2. d. What impact did the lack of full or timely implementation of these strategies have on student outcomes? What data did you use to come to this conclusion?
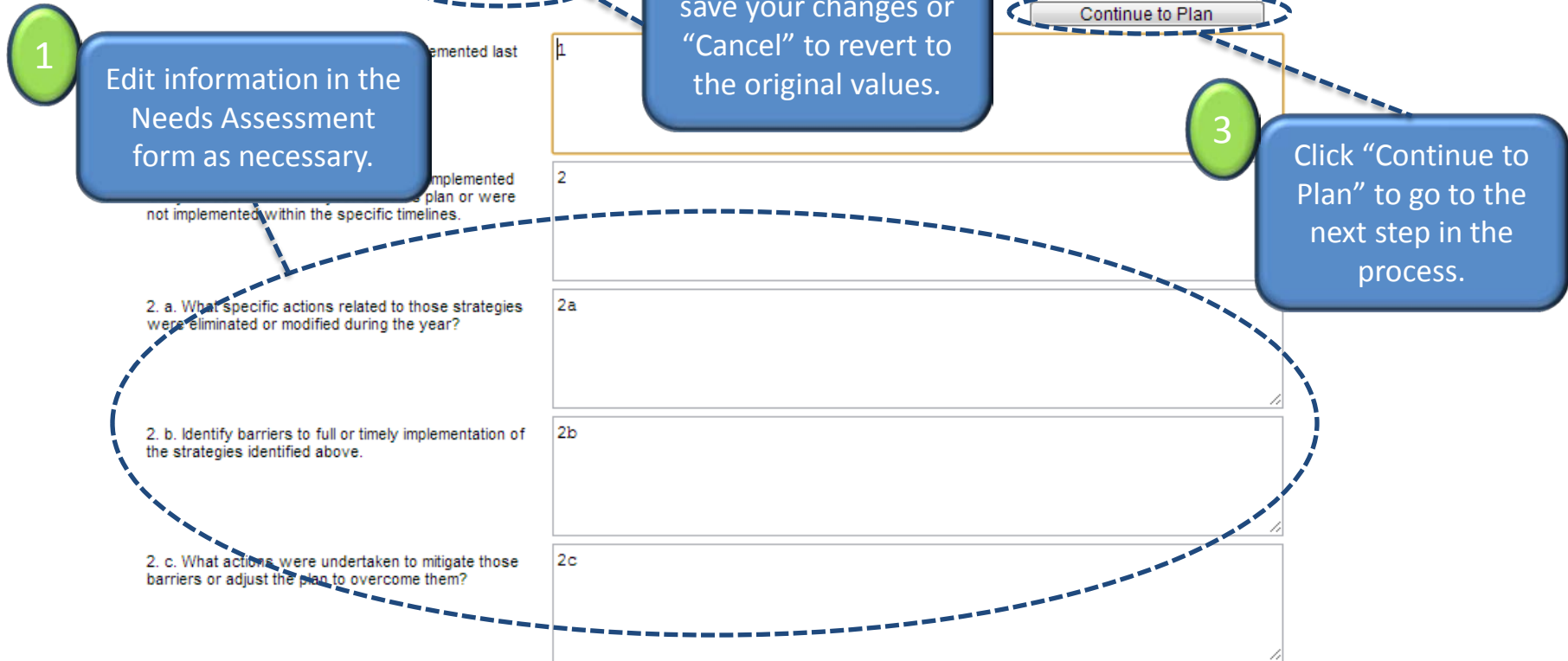
2d

1

The Needs Assessment includes questions to help you assess, alongside the analysis of school data, where your school stands now and what changes might need to be made to improve. This information corresponds to Form G in the Single Plan for Student Achievement. None of the fields are required.
Click "Edit" to edit information if anything needs to be changed.

Needs Assessment (cont.)

Assess Needs for Site Plan: Signs Elementary 2013-14

The Needs Assessment includes questions to h[...]assess, alongside the analysis of school data, where your school stands now and what changes might nee[...]rresponds to Form G in the Single Plan for Student Achievement. Non[...]

Save   Cancel

Continue to Plan

1 Edit information in the Needs Assessment form as necessary.

2 Then click "Save" to save your changes or "Cancel" to revert to the original values.

3 Click "Continue to Plan" to go to the next step in the process.

[...]emented last   1

[...]mplemented [...]plan or were not implemented within the specific timelines.   2

2. a. What specific actions related to those strategies were eliminated or modified during the year?   2a

2. b. Identify barriers to full or timely implementation of the strategies identified above.   2b

2. c. What actions were undertaken to mitigate those barriers or adjust the plan to overcome them?   2c

Plan

- The Plan page is where you will document much of the information required for your school plan. Goals, Strategies, Actions, and Expenditures are all visible on the same page, so you can see how all of the information supports your school goals.

- You must first identify a goal, then strategies, then actions, and then expenditures for each goal. Each goal can have one or more related strategies, each strategy can have one or more related actions, and so on.

- The purpose of the Tool is to guide you with a specific process when planning and budgeting for your school. If, however, you would like to use a different process, you can type "N/A" into the Strategy and Action fields so that you can identify Expenditures and work on ideas for budgeting, while returning to add detail to the Strategy and Action fields later.

Plan (cont.)

Plan for Site Plan: Signs Elementary 2013-14

Goals	Add New Goal	Strategies	Actions	
Edit Delete School Site Operations SMART Goal: Comprehensive Program Component		Edit Delete Increase math scores	Edit Delete Hire math curriculum instructors	Edit Delete Instructor Other Classified Salaries Add New Investment
		Add New Strategy	Edit Delete Hire math teachers	Edit Delete Math teacher 1 Certificated Teachers' Salaries
			Add New Action	
Edit Delete School Site Operations SMART Goal: Increase use of data in making decisions		Edit Delete Help district and school site staff become more comfortable in reading and using data to make decisions.	Edit Delete Bring in outside consultants for analysis	
		Add New Strategy	Edit Delete Explore appropriate software to gather data Add New Action	No Investments have been defined for this Action Add New Investment

1 To start the planning section, click on "Add New Goal." After you add your first Goal, you can then add Strategies, Actions, and then Expenditures.

2 After adding Goals, Strategies, Actions, and Expenditures, you can edit or delete individual items as information changes.

Copy Goals and Strategies

1 To copy Goals and Strategies from another plan to your plan, select "Copy Goals and Strategies" from the "Plan" menu.

2 To better identify goals and strategies that may work for your school, you can filter the Goals and Strategies by year, school, or District Goal Area. Just select the filters you want to use from the drop down lists and click "Apply Filters."

3 Check the boxes next to the Goals and Strategies you wish to copy to your plan.

4 After you have selected the goals and strategies, click "Copy Selected Goals and Strategies to My Plan". You may now edit all of the goal and strategy information to match your school data and specific needs.

Copy Selected Goals and Strategies to My Plan

			All	John F. Kennedy High 2013-	All	
Select	**Year**	**Site Plan**		**Goal Area**		**SMART Goal**
☐	2012-13	John F. Kenn			the use of data at all levels to ensure that clear targets ject, grade, class, and individual students; be analysed regularly to determine the school's academic growth and personal development of all be rigorously monitored; staff will be placed maximize student achievement.	
☐	2012-13	John F. Kennedy High 201			use of data at all levels to ensure that clear targets ject, grade, class, and individual students; be analysed regularly to determine the school's academic growth and personal development of all subgroups will be rigorously monitored; staff will be placed strategically to maximize student achievement.	CSMP and department teams engage in data analysis to crate structures and implement strategies to address achievement disparities between student subgroups.
☐	2012-13	John F. Kennedy High 2013-14		Career- and College-Ready Students	To improve the use of data at all levels to ensure that clear targets are set for subject, grade, class, and individual students; information will be analysed regularly to determine the school's effectiveness; academic growth and personal development of all subgroups will be rigorously monitored; staff will be placed strategically to maximize student achievement.	Design collaboratively and implement common syllabi by core subject and grade level classes.
☐	2012-13	John F. Kennedy High 2013-14		Career- and College-Ready Students	To improve the use of data at all levels to ensure that clear targets are set for subject, grade, class, and individual students; information will be analysed regularly to determine the school's effectiveness; academic growth and personal development of all subgroups will be rigorously monitored; staff will be placed strategically to maximize student achievement.	Design collaboratively and implement common unit and course designs.
☐	2012-13	John F. Kennedy High 2013-14		Career- and C	Teachers will use a variety of instructional strategies and	al strategies and

Check All   Uncheck All

Copy Selected Goals and Strategies to My Plan

Goals

Edit Goal for Site Plan: Signs Elementary 2013-14

Save   Cancel   * **Bold** fields are required.

Goal Area *   School Site Operations

SMART Goal Description *   Comprehensive Program Component

Data Indicator

Baseline/Target Value   0   to   0

What data did you use to form this goal?

What were the findings from the analysis of this data?

How will the school evaluate the progress of this goal?

Save   Cancel

1 Clicking "Add New Goal" or "Edit" will bring you to the Edit Goal page.

2 Select the District Goal Area, write your SMART Goal Description, identify the Data Indicator you want to track and identify the Baseline and Target values for this goal.

3 Enter supporting information for the goal.

4 Then click "Save" to save your changes or "Cancel" to revert to the original values.

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Strategies

Edit Strategy for Site Plan: Signs Elementary 2013-14

1 Clicking "Add New Strategy" or "Edit" will bring you to the Edit Strategy page. The SMART Goal is listed for your reference.

Save   Cancel   * **Bold** fields are required.

Goal Area   School Site Operations

SMART Goal   Comprehensive Program Component

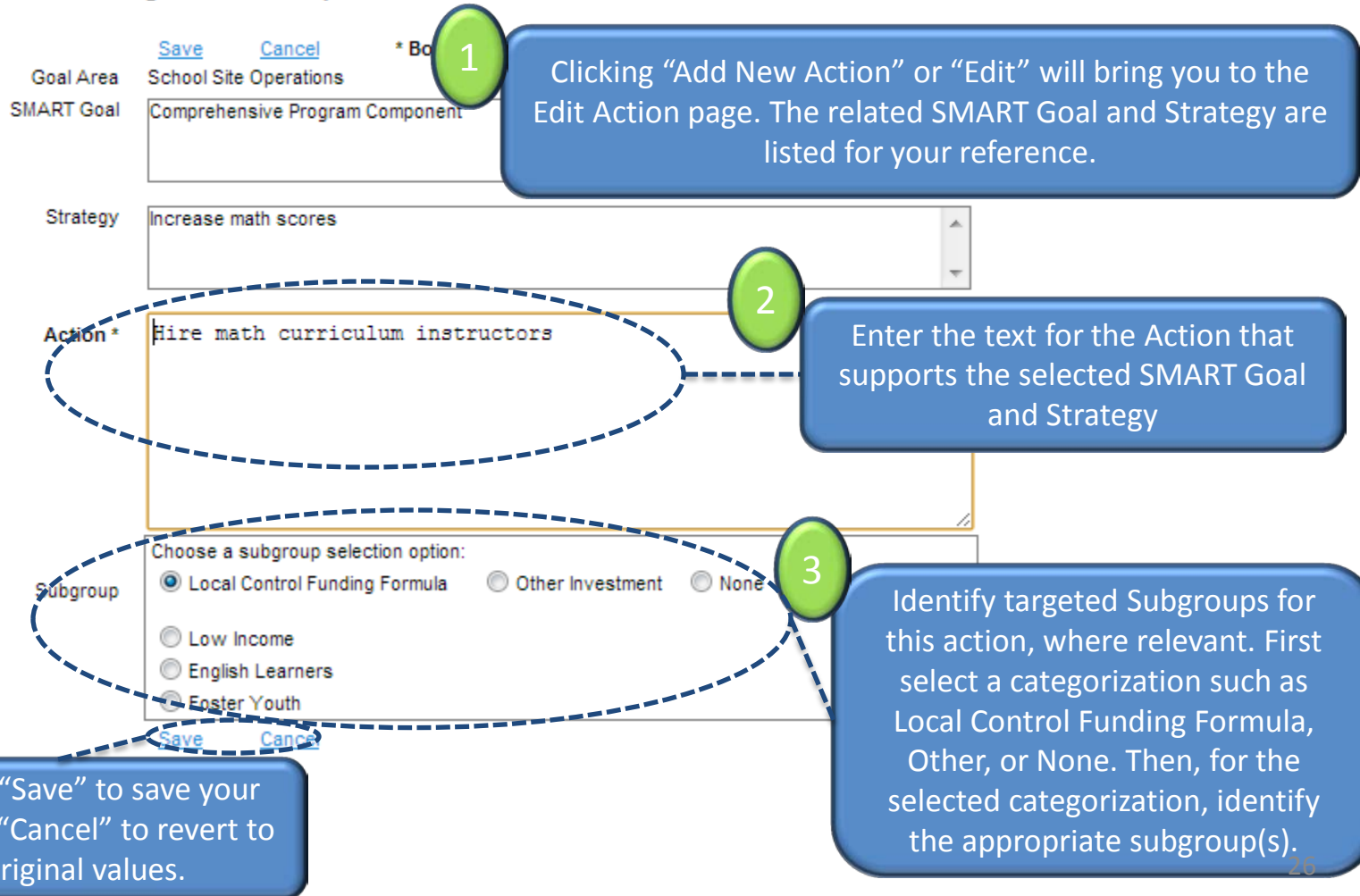**Strategy Description** *   Increase math scores

Save   Cancel

2 Enter the text for your strategy related to the selected SMART Goal.

3 Then click "Save" to save your changes or "Cancel" to revert to the original values.

Actions

Edit Action for Site Plan: Signs Elementary 2013-14

Save   Cancel   * Bo

Goal Area   School Site Operations
SMART Goal   Comprehensive Program Component

1 Clicking "Add New Action" or "Edit" will bring you to the Edit Action page. The related SMART Goal and Strategy are listed for your reference.

Strategy   Increase math scores

Action *   Hire math curriculum instructors

2 Enter the text for the Action that supports the selected SMART Goal and Strategy

Choose a subgroup selection option:

Subgroup   ⦿ Local Control Funding Formula   ◯ Other Investment   ◯ None

◯ Low Income
◯ English Learners
◯ Foster Youth

Save   Cancel

3 Identify targeted Subgroups for this action, where relevant. First select a categorization such as Local Control Funding Formula, Other, or None. Then, for the selected categorization, identify the appropriate subgroup(s).

4 Then click "Save" to save your changes or "Cancel" to revert to the original values.

Expenditures

...n: Signs Elementary 2013-14

1 Clicking "Add New Expenditure" or "Edit" will bring you to the Edit Expenditure page. Editing information will affect the expenditure information across the application.

* **Bold** fields are required.   Return to Plan

...n * Instructor

...e * 2900 Other Classified Salaries

...st * $5,000.00   ☐ Exclude from Budget

Task Description

Person Responsible

Start/Complete Date _____ to _____

Action Hire math curriculum instructors

Notes

Save

2 Identify the Expenditure Description, select the Expenditure Category/Code, identify the Total Estimated Cost for the Expenditure, and whether you would like to include the expenditure in the budget. You can also identify a priority for the expenditure if that information is available.

3 Then, identify a task description to provide further detail as to how this expenditure will be utilized at your school. You can also identify the Person Responsible, Start and Complete date for the task and any other notes that help you keep track of the expenditure.

4 Then click "Save" to save your changes to the Expenditure Description section.

Expenditures (cont.)

1 At the bottom of the Edit Expenditure screen, you can identify funding sources for your expenditure. By viewing expenditures and funding sources on the Budget page, you can see whether you have the necessary funds or whether you will need to make other adjustments to your budget.

Funding Sources

Total Est. Cost $5,000.00

Program Name	Amount	%
Title I, Part A: Allocation (J-K-L=)	$2,000.00	40 %
Title II, Part A: Improving Teacher Quality	$2,500.00	50 %
Donations/Other Funds (unrestricted) ▼		.1
Total	$4,500.00	90.00 %

percentage and then click Save.

Save

2 The Total Estimated Cost is carried over from the Expenditure Description section.

3 Select the funding source from the drop down list

4 Then identify the funding percentage (using a decimal percentage) for that funding source. The expenditure should be funded 100% after all funding sources have been identified.

5 Then click "Save" to save your changes to the Funding Sources section.

Priorities

1 The Priorities page sorts all expenditures by Priority number. To edit the priority of an expenditure, click "Edit" to go to the Edit Expenditures page.

Priorities for Site Plan: Signs Elementary 2013-14

Priorities

	Priority	Investment Description	Investment Category/Code	Total Est. Cost	SMART Goal	Action	
Edit	1	Math teacher 1	Certificated Teachers' Salaries	50,000.00	Comprehensive Program Component	Hire math teachers	Edit
Edit	1	Math teacher 2	Certificated Teachers' Salaries	55,000.00	Comprehensive Program Component		Edit
Edit	3	Instructor	Other Classified Salaries	5,000.00	Comprehensive Program Component		
Edit	5	Consultants	Other Commitments	12,000.00	Increase use of data in making decis		

2 You may use the same priority number for one or more expenditures and can also skip priority numbers if you wish.

Budget

1 The Budget page will show your school budget and map it to Form F in the SPSA templates. On this page, you can edit Funding Allocations and the amounts budgeted and remaining will be shown for each funding source. You can also assign and modify funding sources, as well as all information, for each expenditure from this page.

Budget for Site Plan: Signs Elementary 2013-14

Show Only: All Goals

2 The Budget page shows expenditures for all goals by default. To focus on expenditures for a specific goal, use the filter at the top of the page.

3 The Budget page also displays Fiscal Year Allocations, Budgeted Totals, and Remaining amounts for each funding source.

Funding Source	Total Budget	Unrestricted	Title I A Alloc	T		
Edit Fiscal Year Allocation	$943,100	$277,000	$560,000	$		
Budgeted Total per Funding Source	$109,500	$0	$107,000	$2,500	$0	$0
Remaining Total per Funding Source	$833,600	$277,000	$453,000	$74,500	$23,500	$5,600

	Priority	Hide $	Proposed Investments For Activities and Strategies to Implement this Goal	Category/ Code	Total Est. Cost	Est. Cost	Est. Cost	Est. Cost	Est. Cost	Est. Cost
Edit	1	☐	Math teacher 1	1100	$50,000.00		$50,000.00			
Edit	1	☐	Math teacher 2	1100	$55,000.00		$55,000.00			
Edit	3	☐	Instructor	2900	$5,000.00		$2,000.00	$2,500.00		
Edit	5	☐	Consultants	9760	$12,000.00					

4 Click "Hide $" for the expenditures you do not want to include in your budget.

Edit Fiscal Year Allocations

Budget for Site Plan: Signs Elementary 2013-14

Show Only: All Goals

1 To edit Fiscal Year Allocations, click "Edit" in the Fiscal Year Allocation row on the Budget page. This will bring you to the Edit page for your allocations.

Funding Source	Total Budget	Unrestricted				
Edit Fiscal Year Allocation	$943,100	$277,000				
Budgeted Total per Funding Source	$109,500	$0	$107,000	$2,500	$0	$0
Remaining Total per Funding Source	$833,600	$277,000	$453,000	$74,500	$23,500	$5,600

	Priority	Hide $	Proposed Investments For Activities and Strategies to Implement this Goal	Category/Code	Total Est. Cost	Est. Cost	Est. Cost	Est. Cost	Est. Cost	Est. Cost
Edit	1	☐	Math teacher 1	1100	$50,000.00		$50,000.00			
Edit	1	☐	Math teacher 2	1100	$55,000.00		$55,000.00			
Edit	3	☐	Instructor	2900	$5,000.00		$2,000.00	$2,500.00		
Edit	5	☐	Consultants	9760	$12,000.00					

Edit Fiscal Year Allocations (cont.)

1 To add or edit the funding amounts you expect for the upcoming school year, click the highlighted number under "Funds" in the row you would like to change.

Note: To add or edit the funding amounts you expect for the 2013-14 school year, please click on the 'Funds' link in the row you would like to change, edit the amount and then click Save.

Funding Source	Funds
Unrestricted	5,659,793.00
Title I, Part A: Allocation (J-K-L=)	175,000.00 Save Cancel
EIA-SCE	31,785.00

Close

2 Then, edit the amount and click "Save" to save your changes or "Cancel" to revert to the original values. Click "Close" to go back to the Budget page.

Reports – SPSA

Reports for: Signs Elementary 2013-14

Congratulations! You have completed all the required information for your site plan. Click the
generate your school site plan.

[Single Site Plan Report]

[CDE Form F Report]

[Upload Appendix Documents]

1 After you have completed all of the steps in the process, you can generate the SPSA by going to the Reports page and clicking "Single Site Plan Report."

Budget Reports

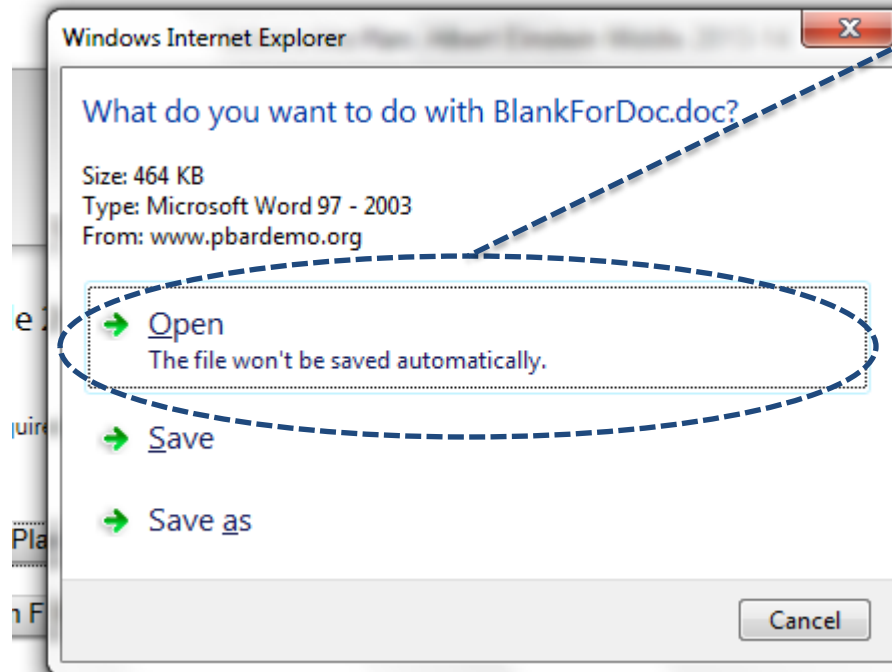|		
[Salary Report]	☐ District-Wide Aggregated	☐ Concatenated Sch
[Non-Salary Report]	☐ District-Wide Aggregated	☐ Concatenated School Re
[Object Code Report]	☐ District-Wide Aggregated	☐ Concatenated School Re
[Budget Goal Area Report]	☐ District-Wide Aggregated	☐ Concatenated School Re
[Budget Subgroup Report]	☐ District-Wide Aggregated	☐ Concatenated School Reports
[Budget by Object Code]	☐ District-Wide Aggregated	☐ Concatenated School Reports
[Budget by Funding Source]	☐ District-Wide Aggregated	☐ Concatenated School Reports

2 Clicking "CDE Form F Report" will create the Form F report, based on the data entered in your Budget section.

Summary Reports

[Board Summary]

[Stakeholders Report]

Reports – SPSA (cont.)

1 After clicking "Single Site Plan Report" on the Reports page, you can open or save the Word document to your computer.

Windows Internet Explorer ❌

What do you want to do with BlankForDoc.doc?

Size: 464 KB
Type: Microsoft Word 97 - 2003
From: www.pbardemo.org

→ **Open**
   The file won't be saved automatically.

→ **Save**

→ **Save as**

Cancel

Other Reports

Budget Reports

Salary Report	☐ District-Wide Aggregated	☐ Concatenated School Reports
Non-Salary Report	☐ District-Wide Aggregated	☐ Concatenated School Reports
Object Code Report	☐ District-Wide Aggregated	☐ Concatenated School Reports
Budget Goal Area Report	☐ District-Wide Aggregated	☐ Concatenated School Reports
Budget Subgroup Report	☐ District-Wide Aggregated	☐ Concatenated School Reports
Budget by Object Code	☐ District-Wide Aggregated	☐ Concatenated School Reports
Budget by Funding Source	☐ District-Wide Aggregated	☐ Concatenated School Reports

Summary Reports

Board Summary
Stakeholders Report

Committee Reports

Committee Report
School Site Council
English Learner Advisory
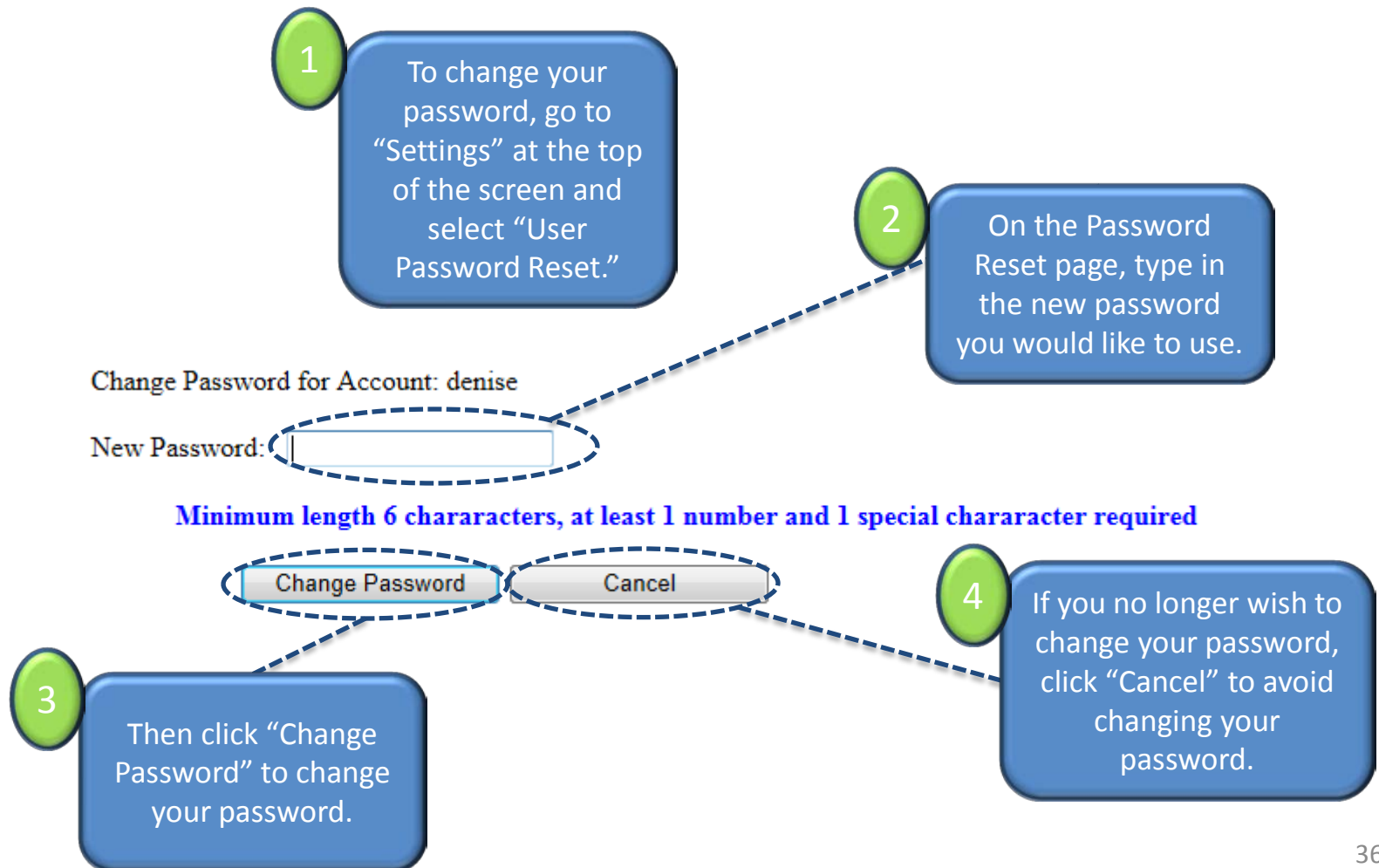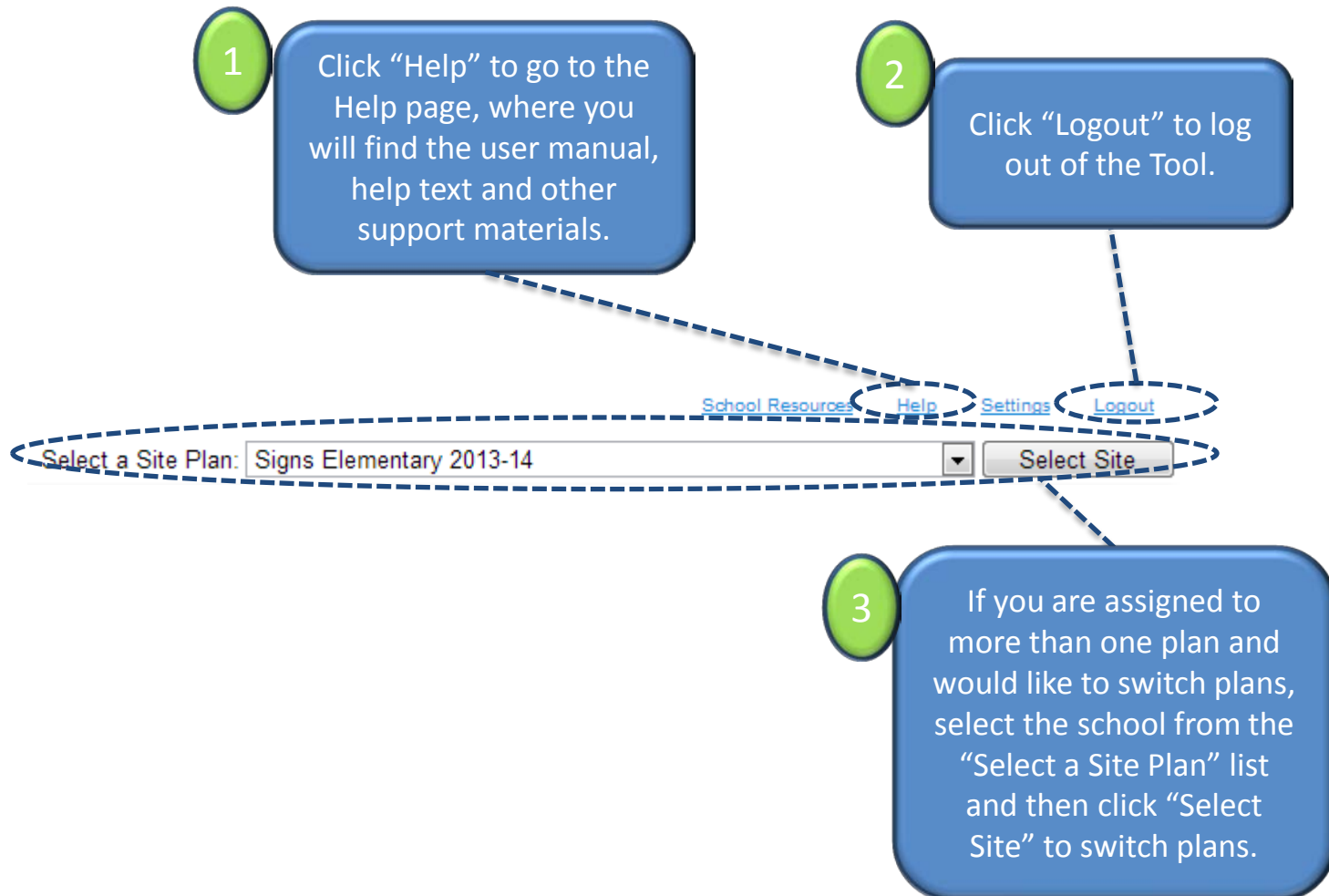
Other Reports

Compare Site Plans
Resources Included (Form C)

1 There are many other reports you can create by clicking on the appropriate buttons on the Reports page.

Change Password

1 To change your password, go to "Settings" at the top of the screen and select "User Password Reset."

2 On the Password Reset page, type in the new password you would like to use.

Change Password for Account: denise

New Password: [   ]

Minimum length 6 chararacters, at least 1 number and 1 special chararacter required

[Change Password] [Cancel]

3 Then click "Change Password" to change your password.

4 If you no longer wish to change your password, click "Cancel" to avoid changing your password.

Help, Logout, and Switch Site Plans

1 Click "Help" to go to the Help page, where you will find the user manual, help text and other support materials.

2 Click "Logout" to log out of the Tool.

School Resources   Help   Settings   Logout

Select a Site Plan: Signs Elementary 2013-14   Select Site

3 If you are assigned to more than one plan and would like to switch plans, select the school from the "Select a Site Plan" list and then click "Select Site" to switch plans.
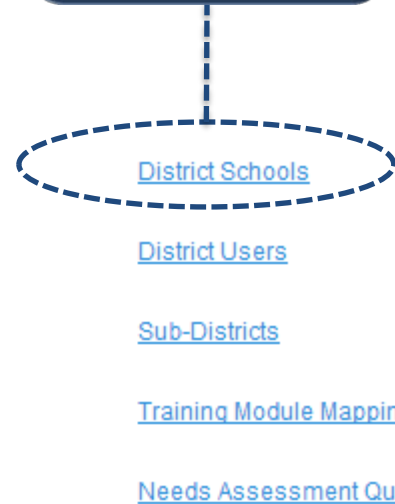
Settings – Add Schools (Admin Only)

1 To add a new school, go to "Settings" at the top of the screen and select "District Settings."

2 Click "District Schools" to access the Schools and Departments page.

District Settings for Site Plan: Signs Elementary 2013-14

Goal Area
Edit

Career- and College-Ready Students
Centralized Services
Family and Community Engagement
Organizational Transformation
School Site Operations

Goal Data Indicator
Edit

A-G Completion Rate
API Scores
AYP Scores
CAHSEE Scores
California State Tests
Graduation Rate
Parent Climate Survey

District Schools

District Users

Sub-Districts

Training Module Mapping

Needs Assessment Questions

Settings – Add Schools (Admin Only)

3 You can edit school information by clicking "Edit."

Edit	Z1 Elementary		E		Delete
Edit	Z2 Elementary		E		Delete
Edit	Z3 Elementary		E		Delete
Edit	Z4 Middle		M		Delete
Edit	Z5 Middle		M		Delete
Edit	Z6 High		H		Delete
Edit	Z7 Elementary		E		Delete
+			E ▼		

2 Click "+" to add the school.

1 Scroll to the bottom of the page, enter the name of the new school, the level of the school and the CDS code.

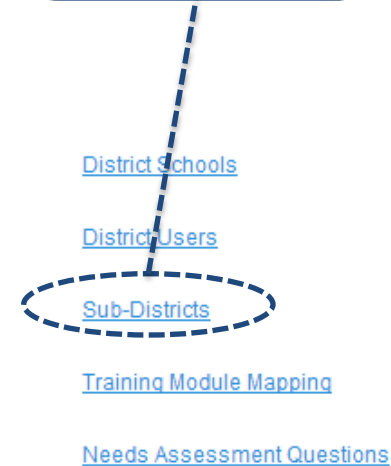# Settings – Create Sub-Districts (Admin Only)

1 Sub-Districts allow you to assign a single user to multiple schools so that the user has access to all schools and plans in that sub-district. To create a Sub-District, go to "Settings" at the top of the screen and select "District Settings."

2 Click "Sub-Districts" to access the Sub-Districts page.

District Settings for Site Plan: Signs Elementary 2013-14

Goal Area
Edit

| Career- and College-Ready Students |
| Centralized Services |
| Family and Community Engagement |
| Organizational Transformation |
| School Site Operations |

Goal Data Indicator
Edit

| A-G Completion Rate |
| API Scores |
| AYP Scores |
| CAHSEE Scores |
| California State Tests |
| Graduation Rate |
| Parent Climate Survey |

District Schools

District Users

Sub-Districts

Training Module Mapping

Needs Assessment Questions

Settings – Create Sub-Districts (Admin Only)

Groups for Site Plan: A. M. Winn Elementary

Select Sub-District: Create a New Sub-District ▼ | Delete Sub-District

To create a new Sub-District, select Create a New Sub-District above, at the top of the list.

Enter a New Sub-District name here: [   ]

| Check All | Uncheck All | Save Changes | Cancel |

	School Name
☐	A. 1 Elementary
☐	A. 2 Elementary
☐	A. 3 Middle
☐	A. 4 Elementary
☐	A. 5 High
☐	A. 6 Elementary
☐	A. 8 Middle

1 To create a new Sub-District, select "Create a New Sub-District" from the Select Sub-District drop down menu

2 Enter the name of the Sub-District

3 Select the schools to be included in the Sub-District.

4 Click "Save Changes" to save the sub-district. After the Sub-District has been created, you may assign users to the subgroup in the District Users section.

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Settings – Add Users (Admin Only)

1 To add a new user, go to "Settings" at the top of the screen and select "District Settings."

2 Click "District Users" to access the District Users page.

District Settings for Site Plan: Signs Elementary 2013-14

Goal Area
Edit

Career- and College-Ready Students
Centralized Services
Family and Community Engagement
Organizational Transformation
School Site Operations

Goal Data Indicator
Edit

A-G Completion Rate
API Scores
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District Schools

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Needs Assessment Questions

Settings – Add Users (Admin Only)

3 You can edit the user information by clicking on "Edit."

		First Name	Last Name	Email	School Name	Sub-District	Admin?	
			Sokol	aaron@edcloud.org	Signs Elementary	None Selected	Yes	Delete
Edit	Denise	Denise	Petrulis	dpetrulis@pivotlearningpartners.org	Signs Elementary	None Selected	Yes	Delete
Edit	denise1	Denise	Petrulis	dpetrulis@pivotlearningpartners.org	Signs Elementary	None Selected	Yes	Delete
Edit	JeeSong2	Jee	Song	jsong@pivotlearningpartners.org	Signs Elementary	None Selected	Yes	Delete
Edit	Kelly	Kelly	Hoppe	khoppe@pivotlearningpartners.org	Signs Elementary	None Selected	Yes	Delete
Edit	kelly1	Kelly	Hoppe	khoppe@pivotlearningpartners.org	Signs Elementary	None Selected	Yes	Delete
Edit	kelly2	Kelly	Hoppe	khoppe@pivotlearningpartners.org	Signs Elementary	None Selected	Yes	Delete
Edit	Kurt	Kurt	Collins	kurt@discolorations.net	Signs Elementary	None Selected	Yes	Delete
Edit	MeganS	Megan	Sweet	msweet@pivotlearningpartners.org	Signs Elementary	None Selected	Yes	Delete
Edit	Ralph1	Ralph	Davies	rdavies@sbcglobal.net	Signs Elementary	All the B Schools	No	Delete
Edit	Ralph2	Ralph	Davies	rdavies@sbcglobal.net	Signs Elementary	None Selected	Yes	Delete
Edit	rdavies	Ralph	Davies	rdavies@sbcglobal.net	Signs Elementary	None Selected	Yes	Delete
+					A. 1 Elementary	None selected	No	

Return

2 Click "+" to add the user. An email will be sent to the user with the user name and a password. The user will be able to change their password after they log in for the first time.

1 Enter the User ID, First Name, Last Name, Email address, primary school, sub-district (if applicable) and identify whether the user will be an Admin or a regular user. An Admin will be able to modify district values, add users and prepare the annual rollover of all plans, among other things.

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Settings – Needs Assessment Questions (Admin Only)

1 To change the Needs Assessment Questions, go to the "Settings" option at the top of the screen and select the "District Settings" option

2 Click on the Needs Assessment Questions link.

District Settings for Site Plan: Signs Elementary 2013-14

Goal Area
Edit

Career- and College-Ready Students
Centralized Services
Family and Community Engagement
Organizational Transformation
School Site Operations

Goal Data Indicator
Edit

A-G Completion Rate
API Scores
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Training Module Mapping

Needs Assessment Questions

Settings – Needs Assessment Questions (Admin Only)

1 You can edit the Needs Assessment questions for your district by editing the questions as desired.

2 Then click "Save" to save your changes or "Cancel" to revert to the original values.

Elementary 2013-14

The Needs Assessment includes questions to help you assess, alongside the analysis of school data, where your school stands now and what changes might need to be made to improve. This information corresponds to Form G in the Single Plan for Student Achievement. None of the fields are required.

Return

Save   Cancel

Question 1:
1. Identify strategies that were fully implemented last year as described in your school's plan.

Question 2:
2. Identify strategies that were not fully implemented last year as described in your school's plan or were not implemented within the specific timelines.

Settings – Change District Values (Admin Only)

1 Administrative users have the ability to change certain drop down values, such as the District Goal Areas, Goal Data Indicators, Expenditure Categories and Codes, Funding Sources and Committee Member Roles.

2 To change drop down values for your district, click "Edit" next to the section you wish to change.

District Settings for Site Plan: Signs Elementary 2013-14

Goal Area
Edit

- Career- and College-Ready Students
- Centralized Services
- Family and Community Engagement
- Organizational Transformation
- School Site Operations

Goal Data Indicator
Edit

- A-G Completion Rate
- API Scores
- AYP Scores
- CAHSEE Scores
- California State Tests
- Graduation Rate
- Parent Climate Survey

District Schools

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Training Module Mapping

Needs Assessment Questions

Settings – Change District Values (Admin Only)

3 You can edit information by clicking "Edit."

Return

	Goal Area	
Edit	Basic Services	Delete
Edit	Course Access	Delete
Edit	Implementation of Common Core State Standards	Delete
Edit	Other Student Outcomes	Delete
Edit	Parental Involvement	Delete
Edit	School Climate	Delete
Edit	Student Achievement	Delete
Edit	Student Engagement	Delete
+		

Note: Goal Area is limited to 50 characters in length

2 Click "+" to add the Goal Area

1 To add a Goal Area, enter the new Goal Area for your district.

Settings – Create Site Plan (Admin Only)

1 After you add a new school, you may want to create a new site plan for the school. To create a new site plan for a school, go to "Settings" at the top of the screen and select "Create Site Plan."

2 To create a new site plan, select "Create a New Site Plan," which is at the top of the drop down list.

Create/Edit a Site Plan

Select a site plan to work on: `Create a New Site Plan` ▼ **Create New** is at the top of the list

Contact Information

Site Plan Name	School Name ▼
School Year ▼	Level ▼
Address	Phone
Address 2	Email
City	Principal First Name
State ▼	Principal Last Name
Zip	Other Contact First Name
CDS Code	Other Contact Last Name

[Save Changes] [Cancel Changes]   [Delete Site Plan]

3 Enter the school plan information.

4 Then, edit the amount and click "Save" to save your changes or "Cancel" to revert to the original values.

Settings – Prepare Annual Rollover, One School (Admin Only)

1 As you prepare for the next year of planning, you may want to rollover the data for some or all of the plans in the Tool. To rollover site plan data, go to "Settings" and select "Prepare Annual Rollover."

2 To rollover data for a single plan, select the plan from the list

3 Then select "Clone All Data Values" or "Prepare an Annual Rollover."

"Clone All Data Values" copies the whole site plan, including Goals, Strategies, Actions, Expenditures, Resources, Committees, Budget and Scorecards.

"Prepare an Annual Rollover" does the same thing as Clone All Data Values, EXCEPT the Expenditure Estimated Costs get zeroed out.

4 Enter the new site plan name and click "Create New Site Plan."

/Rollover an Existing Site Plan for: Create a New Site

pare an Annual Rollover or Copy an Existing Site P

of the available plans would you like to copy?

th Street Elementary 2011-12 (Los Angeles Unifed)
A. M. Winn Elementary 2013-14 (Sacramento City Unified)
Abassador 2011-12 (Los Angeles Unifed)
Aero Haven 10-11 (Twin Rivers Unifed)
Albert Einstein Middle 2013-14 (Sacramento City Unified)
Allison (trusd) 2011-12 (Twin Rivers Unified)
Allison (trusd) 2012-13 (Twin Rivers Unified)
Allison (trusd) 2013-14 (Twin Rivers Unified)
Babcock (trusd) 2011-12 (Twin Rivers Unified)
Babcock (trusd) 2012-13 (Twin Rivers Unified)
Babcock (trusd) 2013-14 (Twin Rivers Unified)
Bowling Green Elementary 2013-14 (Sacramento City Unified)
C&I Department 2012-13 (Twin Rivers Unified)
Castori (trusd) 2012-13 (Twin Rivers Unified)
Castori (trusd) 2013-14 (Twin Rivers Unified)
Central Region ES #14:Camino Nuevo 2011-12 (Los Angeles Unifed)
Central Region ES #14:Local District 4 2011-12 (Los Angeles Unifed)

○ **Clone All Data Values**   ○ **Prepare an Annual Rollover**

New Site Plan Name

[Create New Site Plan] ☑ **Rollover All Plans**

Settings – Prepare Annual Rollover, All Schools (Admin Only)

1 As you prepare for the next year of planning, you may want to rollover the data for some or all of the plans in the Tool. To rollover site plan data, go to "Settings" and select "Prepare Annual Rollover."

Copy/Rollover an Existing Site Plan for: Create a New Site Plan

Prepare an Annual Rollover or Copy an Existing Site Plan

Which of the available plans would you like to copy?

Signs Elementary 2013-14
Solana Beach Middle 2013-14
Sunny High 2013-14
Sunset Elementary 2013-14
Z1 Elementary 2013-14
Z2 Elementary 2013-14
Z3 Elementary 2013-14
Z4 Middle 2013-14
Z5 Middle 2013-14
Z6 High 2013-14
Z7 Elementary 2013-14

○ Clone All Data Values   ○ Prepare an Annual Rollover

New Site Plan Name

[   ]   [Create New Site Plan]

Rollover All Site Plans
From Year [▼]
To Year [▼]
[Rollover Site Plans]

2 To rollover all site plans, select "From Year" and the "To Year" from the dropdown menus.

3 Then click "Rollover Site Plans."

Other Features

- Multiple users at a single site can view and edit the same plan

- Central office users can look at data across schools

- Districts can customize certain aspects of the Tool, such as District Goal Areas and budget data specifics

- School scorecards can also be uploaded for reference