

This document is the project plan for the quarter project in the UCR Documenting Policies and Procedures class, Winter 2015. The quarter project is to develop a portfolio of policies and procedures for a private school serving students with learning differences and emotional and behavioral difficulties.

The planned portfolio will contain one policy and at least one procedure in each of three areas; health and safety, personnel, and administration.

The following sections are covered in this project plan:

- Topics chosen for the policies and procedures
- Project plan schedule
- Preliminary analysis of the reasons for the chosen policies and procedures
- Audience for the policies and procedures
- Goals of and desired results for this project
- Assumptions and boundary conditions for this project
- Requestor Signoff

1. Topics chosen for the policies and procedures are:

- Administrative: Staff Telephone Use
- Health & Safety: Building Energy Control
- Personnel: Staff Attendance

2. The detailed schedule for this project plan is attached at the end of this document, as page 9, after the Requestor Signoff page.

Please note that work for the three policies and procedures is being done in parallel.

Project Major Milestones and Deliverables

<b>Milestone</b>	<b>Due Date</b>	<b>Deliverables</b>
Planning and Schedule	02-08-15	Project Plan with detailed Schedule
P&P Outlines	02-15-15	Outlines for each of the policies and procedures to be developed
P&P Draft 1	02-22-15	First drafts for each of the policies and procedures to be developed
P&P Draft 2	03-08-15	Second drafts for each of the policies and procedures to be developed
P&P Final Draft	03-16-15	Final drafts for each of the policies and procedures to be developed
P&P PDF Output	03-18-15	PDFs of the Handbook containing each of the policies and procedures developed
P&P Online Output	03-18-15	Online doc of the Handbook containing each of the policies and procedures developed
FINAL PROJECT	03-20-15	PDF, Online doc and research notes submitted as Final Project

### 3. Preliminary analysis of the reasons for the chosen policies and procedures

#### Staff Attendance Policy

Staff attendance at school is required for the proper and efficient execution of the school's daily activities.

Specific certifications are required for special education teachers. Sudden or frequent teacher absences create problems finding qualified substitute teachers.

Special certifications are required for some support staff in this private school. Replacement or substitute staff can be difficult to find when there are unplanned and/or unexcused absences.

An attendance policy provides guidelines for school administrators and supervisors to manage and evaluate staff attendance in general and as part of staff performance evaluations. A policy will guide employees in the appropriate use of illness and personal time. The policy will provide guidelines to employees for notification to the school for both planned and unplanned absences. The policy also needs to define clear and enforceable consequences for violating the policy and consequences for failing to enforce the policy.

#### Cell Phone Use Policy

Cell phones can be a positive addition to the learning process. Smartphone access to the web provides a valuable research tool for students. The web, via smartphones, is an excellent way for school staff to provide information on homework assignments, school and class status and other important messages.

At first thought, cell phones would be a great help during an emergency. However research has shown that cell phones can be a great problem because students text information contrary to the emergency procedures. This can cause parents to be in inappropriate places bringing them into harm's way and disrupting emergency responders. In addition, student use of cell phones during an emergency can overload the system making it unavailable to staff and emergency responders.

Finally, cell phone texting is a way to cheat on tests, to spread rumors and cell phones are potentially harmful in case of a bomb threat.

The school needs to create a policy and procedure(s) for use of cell phones on the school campus and in the classroom. The goal of this policy is to create guidelines for the best use of the technology in the school environment. The policy also needs to define clear and enforceable consequences for violating the policy and consequences for failing to enforce the policy.

### Building Energy Control Policy

Schools face ever increasing demands on their budget. There is a constant challenge to balance the use and trade-offs of funds for facilities and funds for education, including staff. In a school for differently-abled students, there are specific needs for building environmental controls. Appropriate energy controls can significantly improve student and teacher performance by providing comfortable learning and living environments.

The policy will provide guidelines for use of energy controls in buildings; for lights, HVAC and operational equipment. Guidelines are necessary for reporting and management of infractions, of student and staff needs, of problems and tracking of expenditures. The policy also needs to define clear and enforceable consequences for violating the policy and consequences for failing to enforce the policy.

#### 4. Policy and Procedures Audience

The audience for this project is the private school staff. Special education teachers are required to have, at minimum, a BA, some states require an MA. Teachers and administrative staff may have additional degrees, up to possibly 20 years of education. Other staff at the school may have significantly less education, perhaps also being non-native English speakers.

The staff has a wide range of education and experience. As a result, the policies will be written with an average Gunning Fog Index reading level between 6 and 8. The procedures will be written with an average procedure readability of less than 2.

5. The goals and desired results for these policies and procedures are that they:

- will be fully formed and properly formatted.
- will cover the core components for each policy and procedure.
- will provide the requestor with a basic starting point from which to customize the policies and procedures for the specific school and environment.
- will properly attribute all research sources so the requestor can follow up for more information.

6. Assumptions and boundary conditions for the project.

A. Budget and Timeframe

- This project is fully funded and there is an adequate timeframe for development and production of basic policies and procedures.
- These documents do not require localization for the class project. If these documents were for a school with the expected audience described above, localization would be required.
- These documents do not require printing, they will be produced as PDFs and online documents.

B. Personnel and Technology

- There is only one writer on this project.
- There is adequate budget and staff for the project.

- Research will be done on the internet rather than by interviewing subject matter experts.
- The final project will be reviewed by Mr. Epps who is both the requestor and has approval authority.
- The writer has access to, training in and expertise in all the technology and tools need for production of the documents.

### C. Analysis and Research

- These policy and procedure topics have been selected by the writer. Information for those topics will be developed from internet research.
- The writer has access to all the technology and tools needed for analysis and research.
- There are no personnel to be interviewed for these documents. Mr. Epps will be reviewing these documents and is both the requestor and has approval authority.
- There is adequate time and budget for the analysis and research necessary for the project.
- There are similar documents available for review on the internet. There are no historical or legacy documents available for this particular project.
- There are existing document templates on the internet which could be used for these policies and procedures. The templates to be used will developed rather than using an existing web template.
- The audience has been identified earlier in this document.
- The document formats will be provided as a combination of narrative and lists. The documents will be produced as both PDFs and online documents.
- Before release to the school staff, these documents will need to be reviewed by a legal department. That review will not be as part of this project since a legal department is not available.

### D. Legal Issues

- Standard, generic, disclaimers will be used in these documents. Those disclaimers as well as the entire set of documents, in general, should be reviewed by legal.
- Standard acknowledgement forms should be signed by the users and readers and collected by the organization.

### E. Depth and Length

- Each policy will be one to three pages long. The accompanying procedures will each be one to three pages long. The length of each document will be determined as that needed to provide sufficient and appropriate information for the audience.
- Since documents will be provided in as online documents, special care should be taken to provide clear, brief documents suitable for the online format.
- There is no standard, such as ISO 9000, to which the documents must conform.

### F. Document Type

- These policies and procedures will be packaged as a handbook.
- Each policy will have at least one procedure.
- The handbook will be published as a PDF and as online document. The use of Madcap Flare software facilitates production of the handbook in multiple outputs using one set of content files.
- No images are required, graphics in general are not expected to be needed for these documents. If they are, they will be created by the writer or used with permission from other sources.
- The handbook does not require localization or printing for the class project. If these documents were for a school with the expected audience described above, localization would be required.

### G. Expertise as writer

- The writer has no experience writing policies and procedures.
- The writer has no background or knowledge about the subject; a private school serving students with learning differences and emotional and behavioral difficulties.
- The writer will perform internet research to determine the core components for each policy and procedure.

Requestor Signoff

This project plan has been read, evaluated and approved by:

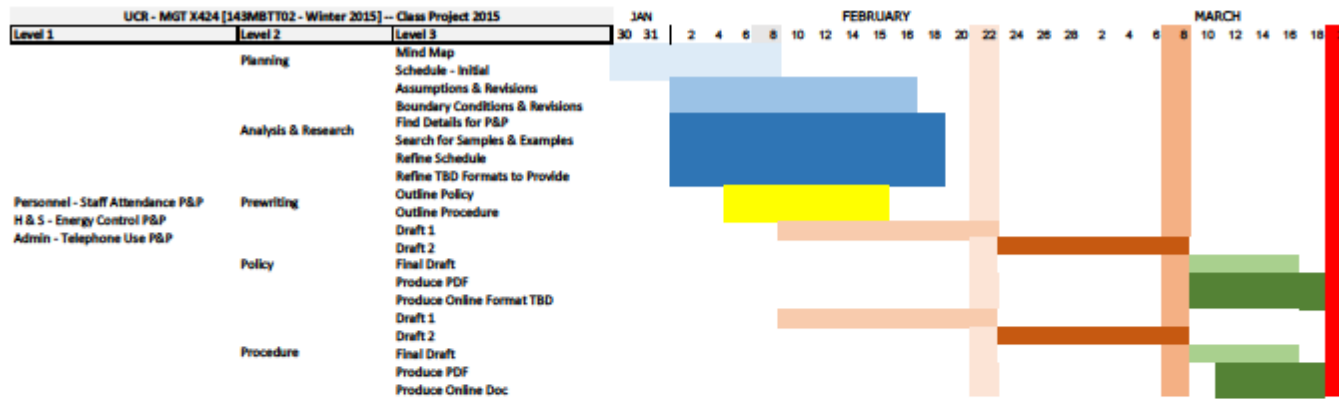
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John Epps

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Date





<p>Personnel - Staff Attendance P&amp;P H &amp; S - Energy Control P&amp;P Admin - Telephone Use P&amp;P</p>	<p>Planning</p> <p>Analysis &amp; Research</p> <p>Prewriting</p> <p>Policies &amp; Procedures</p>	<p>Mind Map</p> <p>Schedule - Initial</p> <p>Assumptions &amp; Revisions</p> <p>Boundary Conditions &amp; Revisions</p> <p>Find Details for P&amp;P</p> <p>Search for Samples &amp; Examples</p> <p>Refine Schedule</p> <p>Refine TBD Formats to Provide</p> <p>Outline Policy</p> <p>Outline Procedure</p> <p>Draft 1</p> <p>Draft 2</p> <p>Final Draft</p> <p>Produce PDF</p> <p>Produce Online Format TBD</p>	<p>Planning completed no later than Feb 8, 2015</p> <p>Analysis &amp; Research may continue for the entire project as needed however the basics are completed by Feb 18, 2015</p> <p>Prewriting, the outlines, completed no later than Feb 15, 2015 P&amp;P Draft 1 completed no later than Feb 22, 2015 P&amp;P Draft 2 completed no later than Mar 8, 2015 P&amp;P Final Drafts completed no later than Mar 16, 2015 P&amp;P PDF completed no later than Mar 18, 2015 P&amp;P Online Doc completed no later than Mar 18, 2015</p> <p><b>Completed Final Project DUE no later than Mar 20, 2015</b></p>
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