Long-Term Planning

Chapter Three

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Introduction

Imagine trying to hike the Appalachian Trail from Springer Mountain, Georgia to Katahdin, Maine without a map, without a compass, without a watch, and without knowing the distance between locations. Now, imagine achieving significant academic gains for your students without having a clear sense of how you are going to get there and how long each step will take.

We outlined three questions at the beginning of this course, and we have already discussed (a) what students should know, understand and be able to do by the end of the year (Chapter One), and (b) how they will demonstrate their mastery (Chapter Two).

The third question asks how you should plan instruction to get students to reach your goals. The remaining chapters in this course discuss how to plan and deliver instruction so that your students can meet the expectations you set. Creating a long-term plan is the first step in this process.

A long-term plan is a document that charts how you have logically grouped and sequenced the standards-aligned learning goals for your course into units that build upon one another conceptually, leading towards year-end goals.

Many well-intentioned teachers have entered the classroom with the noble pledge to teach students as much as possible each day. In reality, such teachers are likely to under-serve their students because the class's path will not be the most efficient one to the end goals. By creating a long-term plan—which groups learning goals for efficient instruction and provides a timeline for pacing throughout the year—these teachers gain the focus and organization necessary to ensure that by the end of the year, their students will have mastered their grade-level standards (and perhaps even more).

It may seem challenging at first, but the long-term planning process creates an essential tool for leading your students to significant academic gains. For a sneak preview, check out the "Sample Long-Term Plan" in the **Instructional Planning & Delivery Toolkit** (pp. 23-33), which can be found online at the Resource Exchange on TFANet. 🛠 This chapter will discuss the high returns afforded by investing in a long-term plan, and will explore the four-step process for developing one:

(1) Use the standards to determine learning goals
(2) Group learning goals into units
(3) Logically order the units and plot them on the school calendar
(4) Continually adjust your plan

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After outlining the long-term planning process, we will explore some of the questions that arise when creating a long-term plan, such as how to account for and set goals for a wide range of students' abilities and how and when to modify the long-term plan throughout the course of the year.

I. The Purposes of a Long-Term Plan

Why should you create a long-term plan? Why is long-term planning a prerequisite to success? Simply stated, having a clear sense of where you and your students are headed and how you will get there provides the focus, direction, and urgency that will allow you to ensure significant academic gains in your classroom. Specifically, long-term plans have the following benefits:

Significant gains are hard, and the only way to keep your eye on the prize is to set intermediate goals that are achievable each month or each unit. The long-term plan makes you constantly reassess where you are and where you're headed so you can correct errors sooner rather than later. Teaching without a long-term plan is like going on a road trip without an atlas: it's bound to get you lost.

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A long-term plan drives students and teachers to purposefully prioritize actions that lead to the achievement of the ultimate goal. Knowing where you want your students to be by the end of the year helps you, as the instructional leader, to make difficult decisions about where to focus your resources and energy. While teaching, you will sometimes face an overwhelming stream of demands for your time, energy, and focus. Especially in your first months in the classroom, you may have the paralyzing feeling that every issue that confronts you is high priority. By establishing clear end goals for your students, you will have a ready litmus test for choosing from among those demands, and you will be much less likely to become side-tracked by objectives, lessons, activities, or time expenditures that do not advance your ultimate quest for academic achievement. Plus, even if you do find yourself momentarily lost, having a long-term plan will enable you to get back on track easily.

A long-term plan allows you to gauge your progress towards your end-goals. The long-term plan allows you to set your pace for the year. You will want to refer to your long-term plan frequently and ask yourself, "Am I where I need to be? Am I spending too much time on certain skills and concepts given the other skills and concepts I have left to teach?" This reflection process enables you to continuously make purposeful instructional decisions that will lead to daily, weekly, and monthly academic progress toward your big goal.

Developing a long-term plan encourages you to purposefully contemplate what you really want students to be able to know and do by the end of the school year. Developing this clear vision of what you want students to accomplish will keep you on track to make a meaningful impact in your students' lives. Further, once you have established this thorough understanding of your content area, you can begin to identify and plan for potential student misunderstandings, remediation and enrichment instruction, and connections between concepts and skills throughout the year. These steps will increase your ability to maintain rigorous instruction that strategically leads your students to reach their academic goals.

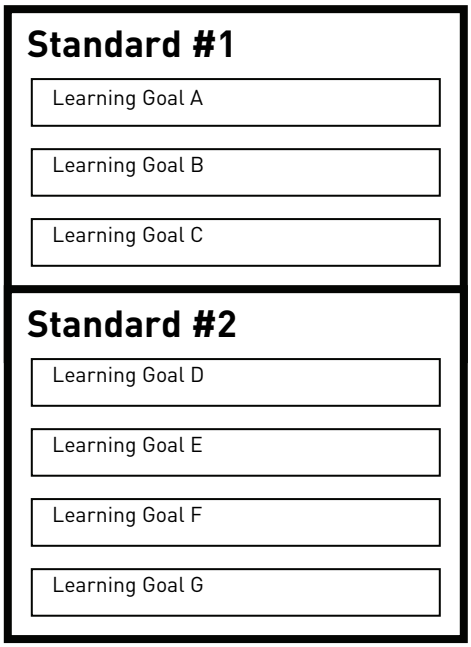
Lastly, having a plan provides you with the comfort and security of knowing what you will teach throughout the year. A long-term plan liberates you from the troubling cycle of "day-to-day" living and planning. With an effective vision for the year, you can anticipate and respond to changing classroom realities, instead of struggling daily to decide what you will teach next. Thus, a long-term plan is a key tool for making purposeful, proactive decisions that will lead your students to achieve significant academic growth.

II. The Four-Step Long-Term Planning Process

The most effective long-term plans take a big-picture, high-flying look at the year. The creation of a long-term plan is the outermost layer of your planning, and one that provides you with a rather blunt instrument for setting and measuring student achievement. There are four basic steps to developing this plan.

A. Use the Standards to Determine Learning Goals

At this point, even if you have a tentative indication that you will teach fifth grade, you probably have little understanding of what a fifth grade should learn. You may know that you will teach seventh grade science this fall in Phoenix yet have no idea what seventh grade science students in Arizona study. That's okay. Even veteran teachers who switch grade levels and content areas face these same questions: "What exactly do I teach? What are students in my class supposed to learn?"



Each standard is the broadest cut of what students are expected to know or be able to do; learning goals are a level more specific.

But from reading Chapter One of this course, you already know how to address these concerns: start with the standards. Your state's standards – rather than your personal memories of what you learned in Mrs. Henk's seventh grade class – should drive your expectations and goals for your students. Once you know generally what grade level you've been tentatively assigned, you'll want to seek out those standards. Refer to the **Instructional Planning & Delivery Toolkit** (pp. 1-2: "Internet Links to Regional and National Standards"), which can be found online at the Resource Exchange on TFANet. 🛠 When you get a copy of your state and district standards, you should:

Digest the standards to determine the learning goals for the grade level you will teach. Know them inside and out. Why? You and your students will be held accountable to standards, and they serve as the basis for setting equal expectations for all schools in the state. Fully understanding or "unpacking" your standards and learning goals is a challenging, layered process that you will undertake at multiple stages in your planning. To review, in Chapter One we first introduced how to read your standards and the sources you can use to clarify their meaning and intent. In Chapter Two we described how to unpack learning goals in greater detail to determine the specific evidence students will need to produce in order to demonstrate mastery on an assessment.

At this point, however, we will step back from this level of detail. For the purposes of a long-term plan, it is necessary to use standards to identify or create aligned learning goals. Remember that different states vary in the level of guidance they provide around standards. Many states break down their broad standards into more specific learning goals (bundles of skills and knowledge) while other states have standards that already exist at a learning goal-level of detail. However, if your state does *not* provide a sufficient level of specificity in its standards, it will be your responsibility to create standards-aligned learning goals to use in your long-term plan. Identifying (and understanding) the learning goals for your grade level or content area is essential for the creation of your long-term plan.

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To help re-illustrate the difference between learning goals and standards, examine the following mathematics state standards from Georgia:

Georgia Performance Standards: Mathematics 1 (Algebra)[9]

MM1A1. Students will explore and interpret the characteristics of functions, using graphs, tables, and simple algebraic techniques.

a. Represent functions using function notation.
b. Graph the basic functions $f(x) = x^n$, where $n = 1$ to 3, $f(x) = x$, $f(x) = |x|$, and $f(x) = 1/x$.
c. Graph transformations of basic functions including vertical shifts, stretches, and shrinks, as well as reflections across the x- and y-axes.
d. Investigate and explain the characteristics of a function: domain, range, zeros, intercepts, intervals of increase and decrease, maximum and minimum values, and end behavior.
e. Relate to a given context the characteristics of a function, and use graphs and tables to investigate its behavior.
f. Recognize sequences as functions with domains that are whole numbers.
g. Explore rates of change, comparing constant rates of change (i.e., slope) versus variable rates of change. Compare rates of change of linear, quadratic, square root, and other function families.
h. Determine graphically and algebraically whether a function has symmetry and whether it is even, odd, or neither.
i. Understand that any equation in x can be interpreted as the equation $f(x) = g(x)$, and interpret the solutions of the equation as the x-value(s) of the intersection point(s) of the graphs of $y = f(x)$ and $y = g(x)$.

The example above shows how a broad standard (in bold) can be broken into a bundled list of aligned learning goals. If your state does not provide this level of guidance, there are a series of tools that can help you digest your standards to derive aligned learning goals. As Chapter One outlined, seek out the advice of your district's curriculum guide, the innumerable resources on the Internet, and colleagues who know their way around these initially intimidating documents. Examining samples of assessments and exemplary student work can also help you determine how to break your standards into more manageable units.

Connection to the Big Goal
Remember that unpacking your standards and determining your vision for student achievement are key steps in the creation of your big goal. Developing your big goal before your long-term plan allows you to be more effective and efficient as you craft your roadmap for the year. Later (in Step Four) we will take extra measures to ensure that your long-term plan is aligned with your big goal. However, don't hesitate to look at your big goal now as you formulate your year-long plans.

Remember to refer to Chapters One and Two for guidance on how to interpret and unpack your standards. For more information, you can also look at the standards for the grade levels above and below the level you teach. Although it is not as important to know these standards thoroughly, familiarity with them will provide the foundation for your grade level standards and illustrate the knowledge continuum of which your standards are a part. Further, it can be helpful to examine standards written by other outside organizations, although such standards should only be supplemental to what is outlined in your state and district. Following this guidance will allow you to establish a solid vision of what students need to accomplish over the course of the year.

[9] Standards HS Math 1 July 2006.
http://www.georgiastandards.org/DMGetDocument.aspx/Standards%20HS%20Math%201%20July%202006.pdf?p=6CC6799F8C1371F6A53EDDBCD81AFF25221C13C3F28F0C3131F77C63ACAF4698&Type=D, accessed 12/20/07.

So, the first step of long-term planning is to familiarize yourself with the standards and determine your classroom learning goals. You will see how these broad standards (e.g. "students will investigate structure and function in living systems") and the more specific learning goals (e.g. "students will identify, compare and contrast levels of organization including cells, tissues, organs, organ systems and organisms") provide direction and focus to your instruction. They may not be grouped into units (this is discussed in the next section), ordered in a logical sequence, or broken down into discrete lesson objectives (these skills are covered in Chapter Four), but by internalizing these standards and learning goals and using them to guide your instruction, you will find that your teaching, your students, and the academic achievement that occurs in your classroom will be more focused and consequently more successful.

B. Group Learning Goals Into Units

Your list of learning goals provides a framework for what students should know and be able to do by the end of the year. However, as you will notice when you examine them, learning goals are not always presented in a particular order.

The next step in the long-term planning process is to group these learning goals into smaller "units" that will guide your instruction more specifically during the year or semester and support the efficiency and coherence of the learning process. This step of the long-term planning process allows you to see the "big picture," — the overarching conceptual organization of your instruction to meet the big goal. It also helps pace your instruction over the course of the year and determine when (between your initial diagnostics and your final assessments) to benchmark student progress.

Benchmarks

A "benchmark," as the term is most commonly used, refers to periodic progress checks that you implement along the path from an initial diagnosis to the final assessment. As we have already discussed in Chapter Two – and will continue to explore in the next few chapters – teachers need to frequently measure students' incremental progress and understanding. By determining where students stand relative to their starting point and ultimate goal, you can adapt your instruction to help them move forward most effectively. In the case of the long-term plan, measuring student mastery of a group of learning goals is an appropriate benchmark between the beginning-of-year diagnosis and the end-of-year assessment.

We will take an in-depth look at unit planning in the next chapter. For the purposes of the long-term plan, however, we are only concerned with sequencing and grouping our learning goals into units that will lead to the achievement of the big goal. To help do this you can utilize multiple sources, including textbooks, curriculum guides, veteran teachers, and the Student Achievement Toolkit that you will receive in your region. In addition, referring back to your big goal and the unpacked standards and learning goals from Step One will lay the foundation for effectively completing this second step of long-term planning. Regardless of what resources you use, you should always do the following when grouping your standards-aligned learning goals into units:

(1) Ensure that the learning goals you choose to group together share a logical connection that will readily make sense to you and to students. Units created by randomly selecting learning goals from among all the necessary skills lack cohesion and will thereby cause loss of momentum, as students will struggle to understand the relevance and context of different learning experiences. Conversely, linking conceptually related learning goals and planning in way that makes those relationships clear to students will enhance instruction by promoting deeper student understanding of key ideas.

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As an example in the box on the next page, consider the Washington, DC standards (in bold) and learning goals (below each standard) for second grade math.[10] A teacher could justifiably regroup some of these learning goals, as several overlap and utilize the same skills. For example, the learning goal "masters addition and corresponding subtraction facts from 0 – 18" from the Number and Operations standard could be presented and reinforced through teaching the learning goal "adds and subtracts money" from the Measurement standard. Likewise, the learning goal of "determines whether numbers are odd or even" could correspond with the first learning goal under the Patterns standard, and "collects, records, and displays data using tables, pictographs, and bar graphs" aligns nicely with "uses ordered pairs to locate positions on a simple coordinate grid."

[10] DCPS Standards, Mathematics, Grade 2. All Washington, DC standards are available at http://www.k12.dc.us/dcps/curriculum/curriculum1.html.

Example Step One: Using the Standards
Second Grade Math Standards—Washington, DC

1) Numbers and Operations: The student interprets multiple uses and forms of numbers and how they relate to each other

Masters addition and corresponding subtraction facts from 0 – 18

Determines whether numbers are odd or even

Reads, compares, and orders whole numbers to 1,000

Uses concrete objects to model and identify place value in three-digit numbers

Adds and subtracts two and three digit numbers with and without regrouping

Skip counts forward and backwards by 2's, 5's and 10's from a given number

Joins and separates equivalent sets of objects to describe multiplication and division

Identifies fractional parts of objects, shapes, and sets of objects

Rounds and estimates sums and differences of two-digit numbers

Solves problems using a variety of strategies

(2) Patterns, Functions, and Algebra: The student generalizes patterns and functional relationships; uses symbols to represent mathematical situations; analyzes change in real and abstract situations

Identifies types of patterns in the real world (repeating, tessellating, etc)

Recognizes and extends geometric and number patterns and explains the rule

Uses patterns to predict and solve problems

Models the commutative and associative properties of addition using concrete objects

Completes number sentences with missing values and operation symbols

Solves number sentences with equalities and inequalities

Describes the functional relationship between pairs of numbers from real-life situations

(3) Data Analysis, Statistics and Probability: The student collects, organizes, represents evaluates and interprets data; makes predictions based on data; applies basic understandings of chance and probability

Collects, records, and displays data using tables, pictographs, and bar graphs

Verifies predictions based on simple probability experiments

Uses data to describe events as more likely or less likely or equally likely

Analyzes and explains results from a survey

(4) Geometry and Spatial Sense: The student analyzes characteristics of two and three-dimensional geometric objects; uses visual and spatial reasoning to analyze mathematical situations

Uses attributes to describe and compare properties of shapes and solids

Identifies & classifies plane & 3-D shapes and their geometrical relationships

Compares and contrasts two and three-dimensional shapes and objects

Identifies & demonstrates slides, flips, and rotations of figures using concrete materials

Matches and creates congruent and symmetrical shapes

Uses ordered pairs to locate positions on a simple coordinate grid

(5) Measurement: The student selects and uses the appropriate tools and units for systems of measurement; applies a variety of techniques to determine measurements

Estimates and measures length, height and perimeter using cm, m, in, and feet

Weighs objects to the nearest pound and kilogram

Counts and compares the value of collections of coins up to $1.00

Adds and subtracts money

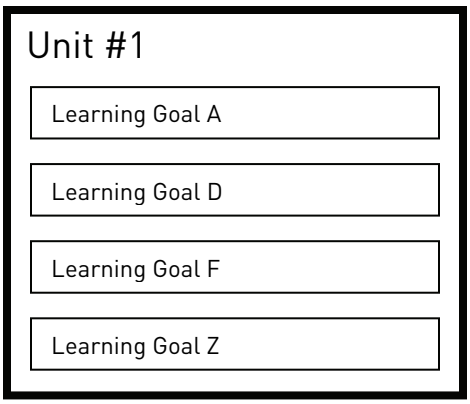
Measures and records temperature to nearest 10 degrees using F and C thermometers

Tells time to the quarter-hour and 5-minute intervals

Estimates time and elapsed time using minutes, half-hours and hours

Notice that some of the skills could be reinforced (or even completely taught) during a morning meeting, a time in most elementary school classes that should be used for skill development and review. [This is an important point to note, as elementary teachers should look for opportunities to reinforce skills and concepts at times other than just "math hour" or "language arts time," and secondary teachers should seek to integrate math, reading, and writing skills into their content area.]

Examine the way that one elementary teacher grouped the DC learning goals. Note that these units are not yet in a particular order, nor are the learning goals in each unit. Consider how the learning goals are grouped differently from the previous example (the numbers in parentheses indicate the standards from which each learning goal originated).



Learning goals, originally housed in different standards, come together in "units" based on their commonalities

Example Step Two: Grouping Your Learning Goals			
A. *Skills to be integrated into morning meetings	**B. Geometric Patterns (6 weeks)**	**C. Number Patterns (6 weeks)**	**D. Data Analysis (6 weeks)**
(1) Determines whether numbers are odd or even (1) Skip counts forward and backwards by 2's, 5's and 10's from a given number (1) Uses concrete objects to model and identify place value in three-digit numbers (3) Collects, records, and displays data using tables, pictographs, and bar graphs (5) Uses a calendar to identify dates; communicates time relationships (days in a week, weeks in a year etc.) (5) Measures and records temperature to the nearest 10 degrees using F and C thermometers (5) Tells time to the quarter-hour and 5-minute intervals (5) Estimates time and elapsed time using minutes, half-hours and hours (1) Identifies fractional parts of objects, shapes, and sets of objects (1) Joins and separates equivalent sets of objects to describe multiplication and division	(2) Identifies types of patterns in the real world (repeating, **tessellating,** etc.) (2) Recognizes and extends **geometric** and number patterns and explains the rule (2) Uses patterns to predict and solve problems (4) Uses attributes to describe and compare properties of shapes and solids (4) Identifies and classifies plane and three-dimensional shapes and their geometric relationships (4) Compares and contrasts two and three-dimensional shapes and objects (4) Identifies and demonstrates slides, flips, and rotations of figures using concrete materials (4) Matches and creates congruent and symmetrical shapes	(2) Identifies types of patterns in the real world (**repeating,** tessellating, etc.) (2) Recognizes and extends geometric and **number patterns** and explains the rule ***(1) Determines whether numbers are odd or even (2) Uses patterns to predict and solve problems (2) Describes the functional relationship between given pairs of numbers from real-life situations (i.e. numbers of people and numbers of eyes)	***(3) Collects, records, and displays data using tables, pictographs, and bar graphs (3) Analyzes and explains results from a survey (3) Verifies predictions based on simple probability experiments (3) Uses data to describe events as more likely or less likely or equally likely (4) Uses ordered pairs to locate positions on a simple coordinate grid

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E. Addition and Subtraction (6 weeks)	F. Big Numbers and Basic Algebra (6 weeks)	G. Introduction to Fractions and Division (2 weeks)	H. Measurement (6 weeks)
(1) Masters addition and corresponding subtraction facts from 0 – 18 (5) Counts and compares the value of collections of coins up to $1.00 (5) Adds and subtracts money *****(1) Skip counts forward and backwards by 2's, 5's and 10's from a given number	(1) Adds and subtracts two and three-digit numbers with and without regrouping (1) Rounds and estimates sums and differences of two-digit numbers (1) Reads, compares, and orders whole numbers to 1,000 *****(1) Uses concrete objects to model and identify place value in three-digit numbers (2) Models the commutative and associative properties of addition using concrete objects (2) Completes number sentences with missing values and operation symbols (2) Solves number sentences with equalities and inequalities	*****(1) Identifies fractional parts of objects, shapes, and sets of objects *****(1) Joins and separates equivalent sets of objects to describe multiplication and division	(5) Estimates and measures length, height and perimeter using cm, m, in, and feet (5) Weighs objects to the nearest pound and kilogram *****(5) Measures and records temperature to the nearest 10 degrees using F and C thermometers *****(5) Tells time to the quarter-hour and 5-minute intervals *****(5) Estimates time and elapsed time using minutes, half-hours and hours *****(5) Uses a calendar to identify dates; communicates time relationships (days in a week, weeks in a year etc.)

Similarly, you'd miss out on key linkages if you marched through the eighth grade social studies standards instead of seeking out commonalities. These related standards are sprinkled throughout the Texas guidelines[11]:

- 4D: Analyze the issues of the Philadelphia Convention of 1787, including major compromises and arguments for and against ratification
- 17A: Summarize the purposes for and processes for changing the U.S. Constitution
- 20B: Summarize rights guaranteed in the Bill of Rights

Examine the ways in which different states group their standards to get ideas for how to link yours. North Carolina's World Geography Standards, for example, are grouped into pre-made thematic units based on overarching ideas. For more information, search the web sites listed in the **Instructional Planning & Delivery Toolkit** (pp. 1-2: "Internet Links to Regional and National Standards"), which can be found online at the Resource Exchange on TFANet. 🛠.

(2) Where applicable, distinguish between (a) facts and concepts, (b) broad principles and themes that crosscut many facts and concepts, and (c) skills to be reinforced regularly. You will quickly see that not all learning goals are created equal. Let's look at five more essential elements from Texas's eighth grade social studies standards:[12]

[11] TEKS for Social Studies, Middle School. http://www.tea.state.tx.us/rules/tac/chapter113/ch113b.html, accessed 7/1/2010. Links to all Texas state standards available at http://www.tea.state.tx.us/index2.aspx?id=6148.
[12] Ibid.

A. Students will be able to summarize the strengths and weaknesses of the Articles of Confederation.
B. Students will be able to describe how scientific ideas influenced technological developments during different periods in U.S. history.
C. Students will be able to trace the development of religious freedom in the United States.
D. Students will be able to explain and analyze Abraham Lincoln's ideas about liberty, equality, union and government as contained in his first and second inaugural addresses and the Gettysburg Address.
E. Students will be able to create written, oral, and visual presentations of social studies information.

Notice how learning goals A and D deal with fairly specific facts or concepts that students are expected to know, just as students in reading classes might learn the characteristics of a mystery and then move on to a different unit on biographies. Since the Articles of Confederation and the Gettysburg address are separated by nearly a century, it is fairly safe to say that these two goals would not appear in the same unit.

In contrast, learning goals B and C refer to large swaths of history; they include themes that a class can consider along the historical continuum (imagine a student-created "timeline of technology" in the classroom, built upon during every unit). You might introduce these themes at different times during one of the first few units of the year, but you will revisit them both throughout the semester.

Similarly, learning goal E is a skill you will need to introduce and teach; you simply cannot assume that students will be able to give an impromptu speech, for example. But this is a skill you will revisit over time. As they learn new facts and develop larger thematic understandings, students will regularly produce written, oral and visual presentations, just like students in reading classes will revisit the skill of writing summaries and making predictions about the various genres they learn throughout the year.

Separating larger ideas may allow you to see the forest from the trees, enabling you to create pegs on which to hang the more specific, atomized facts and details of the curriculum. Chapter Four (Unit Planning) will give you ideas for integrating the learning goals of each "bucket" into a cohesive series of lessons through projects, themes, and goals.

C. Logically Order the Units and Plot Them on the School Calendar

Sequencing units
In addition to ensuring that the learning goals allocated to various units cohesively relate, you must also ensure that the sequence and timing of units over the course of the year is logical. By completing this third step of long-term planning you will continue to enhance your content understanding by thinking deeply about how your units build upon each other to maximize student understanding and reach your big goal.

To create my long-term plan I sat down with a fellow corps member, a calendar, the state standards, and a large cup of coffee. We grouped similar standards into units and then determined how many weeks should be given to each unit. Fitting each unit into the school year was surprisingly difficult, but the plus side was that the process created a sense of urgency in my teaching from the very beginning and it made weekly planning much easier.

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To effectively order units, you will use the same resources, rationale and strategic decision-making process introduced in the prior step of grouping learning goals. Some units include learning goals that are a prerequisite to learning goals in other units.

Not all standards make those relationships clear, so it will be important for you to critically evaluate the relationships and connections of one standard and unit to another. Doing this will allow you to logically structure your plan to foster student Comprehension of Course Material.

Consider, for example, the second grade math learning goals from DC[13]. The units right now are not sequenced in the most logical and progressive way – geometric patterns should probably come later in the year than number patterns, as understanding of geometric patterns requires knowledge of three-dimensional shapes and an ability to manipulate shapes mentally. The unit on measurement should probably occur before data analysis, because in order to collect data one must often be able to measure dimensions, temperature, and mass. Given these considerations, the grouped units could be reorganized in this near-complete long-term plan, as follows:

Example Step Three: Ordering Your Groupings			
*Skills to be integrated into morning meetings	**First Unit:** Addition and Subtraction (6 weeks)	**Second Unit:** Number Patterns (6 weeks)	**Third Unit:** Measurement (6 weeks)
Fourth Unit: Data Analysis (6 weeks)	**Fifth Unit:** Big Numbers and Basic Algebra (6 weeks)	**Sixth Unit:** Geometric Patterns (6 weeks)	**Seventh Unit:** Introduction to Fractions and Division (2 weeks)

This sequence of units builds from the more concrete (adding and subtracting) to the more abstract (geometric patterns). Skills learned in one unit (measurement) are reinforced and applied in a later unit (data analysis). A language arts teacher might decide to focus first on words (correct usage of plurals and possessives, choosing precise nouns, verbs, adjectives and adverbs), then move on to sentences (avoiding run-ons, adding prepositional phrases and dependent clauses), and paragraphs (topic sentences, transitions, conclusions), all the while practicing full compositions in different styles. By placing the most complicated or highest-level standards-aligned learning goals of your subject area at the end of your year, you have set a goal for your students, and the other units should be organized as stepping-stones to that destination. Similarly, an effective sequence of learning goals and units should progressively lead students to achieve their overarching big goal for the year.

Transferring the plan to the calendar

Once you have determined your unit sequence you can begin to plot your units on a school calendar. In doing so, you gain a holistic perspective of the year that will provide you with a sense of urgency, dedication, and purpose to achieve the end goals.

You should not arbitrarily allocate time to each unit. Rather, like grouping and sequencing your learning goals, you should think critically about how to time your units to most effectively reach your big goal. Consider the following guiding questions as you calendar:

- How long will it take to teach certain topics and what resources can I access to help me estimate appropriate unit lengths?
- Given your desired overarching result, what concepts or learning goals should hold a higher priority, and thus warrant more time?
- Is the plan efficient? Is anything ignored or overemphasized?

When you plot units onto a school calendar, it is important to take into account school breaks such as winter and spring vacation, days devoted to standardized testing, district professional development days,

[13] DCPS Standards, Mathematics, Grade 2. Washington, DC standards are available at http://www.k12.dc.us/dcps/curriculum/curriculum1.html.

and deadlines for submitting final grades for the quarter, semester, or year (often, grades must be turned in one to two weeks before the end of the grading period to allow for school-wide processing – you don't want to be caught in the middle of your last unit when final grades need to be turned in). Tentatively plot your units on a school calendar, recognizing various days or weeks that interfere with regular instruction. To see an example of how this can be done, refer to the **Instructional Planning & Delivery Toolkit** (p. 34: "Sample Long-Term Plan, Mapped on a Calendar"), which can be found online at the Resource Exchange on TFANet. 🛠.

If you finish with more weeks than units, you may be underestimating how long certain topics will take to teach, and you may want to share your plans with a veteran teacher. On the other hand, if you end up with more units than weeks on your calendar you will need to review the learning goals and either regroup them or eliminate non-essential ones once you conduct your diagnostics and determine where your students are already strong. Your unit calendar should also actively plan for remediation, enrichment, and differentiation throughout the year. Schedule opportunities to review and re-teach difficult concepts as well as to extend learning for students who quickly master grade-level standards. Likewise, schedule extra time into your calendar to account for contingencies, if possible. Building extra time into the year's schedule allows you to respond to a variety of factors that may delay or side-track your plans during the year.

Although I used a long-term plan, which outlined both major and minor goals, I learned that one could never anticipate everything that will happen with student learning or within the school environment. A few minutes of revisiting my plans and reflecting on my students' progress each evening helped me to fine-tune them to meet the needs of my students.

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Making these adjustments – the final step in the long-term planning process – is vital in creating a long-term plan that is an effective tool toward reaching your goals. The next section details when and how to alter your long-term plan.

D. Continually Adjust Your Plan

It is critical to realize that your long-term plan and its pacing are not set in stone. Rather, the plan is an organic document that will be revised and adjusted. You will need to alter your plan frequently throughout the year to respond to ongoing assessment data and to align it with your big goal and summative assessment.

Responding to ongoing assessment data

Your diagnostic assessment will give you valuable information about your students' current academic strengths and weaknesses. As you analyze the data from the diagnostic, you will learn what knowledge and skills your students currently have and what prerequisites they will need in order to master grade-level content. This incoming information will enable you to modify and enhance preexisting plans for remedial and enriched content that you developed in your long-term plan calendar. Adjusting your plan in response to this data is essential for leading students forward effectively.

For instance, if students are behind grade level, you will need to find ways to catch them up while maintaining progress toward the big goal. To do this, examine your long-term plan and carefully eliminate learning goals that students have firmly mastered and do not serve as important foundations to subsequent units. Next, identify places where you can integrate remedial learning goals and review for objectives that students need in order to learn grade-level content. It is difficult to balance the need for teaching prerequisite knowledge and skills while simultaneously leading students to master their grade-level standards. To help manage this balance of integrating remedial goals into grade-level instruction,

check out the **Instructional Planning & Delivery Toolkit** (p. 35: "Remediation Strategies"), which can be found online at the Resource Exchange on TFANet. 🛠

Ultimately, you may discover that there are too many standards to realistically cover in one year while providing students with the foundational knowledge and skills they need to tackle grade level material. In this case, it may be necessary to prioritize some learning goals over "non-essential" goals that might be left for enrichment or eliminated altogether. Understand that prioritizing standards should be done **with great caution** and careful consideration. Any time you decide that one standard is more important than another, you risk depriving students of instruction on important grade-level material that other students will receive. For assistance, always seek the guidance of a veteran teacher with strong content knowledge. In addition, you can prioritize standards by determining if your state already highlights some goals as "essential" or "key," and by closely examining which standards serve as important foundations for understanding content in future grade levels.

After creating an initial long-term plan, many teachers often fail to revisit their plans and make appropriate adjustments. In doing so, they often begin teaching grade-level material only to realize later that their students lack key prerequisite knowledge. This forces them to restart instruction at a different point, wasting valuable instructional time. To avoid this mistake, continually adjust your plans to respond to incoming data about your students' readiness and mastery-level. Only by strategically recalibrating your long-term plan will you be able to both catch students up to speed and move them forward in mastering grade level material.

Too many new teachers believe that getting behind in their long-term plan means they should scrap the whole thing. On the contrary, if you get behind in the pacing that you set for yourself, you need to return to that document and reconfigure your plans so that you can still reach your ambitious goals for your students. Perhaps you can modify the remaining units, combining learning goals in order to shorten the unit length. Perhaps there are learning goals that you should prioritize over others. But do not throw your hands up and the plan out; instead revisit it and revise it appropriately. Remember, an effective long-term plan calendar should already have time built in to respond to inevitable, unexpected detours and the need for review or remediation.

Likewise, getting ahead in your pacing does not devalue your long-term plan. In this situation, you have a tremendous opportunity to further enrich students' learning by digging more deeply into your grade-level standards or even pressing on to standards above your grade-level. Once again, return to your long-term plan. Modify units that can be expanded and add in others that can be included in the year.

Alignment with the big goal and summative assessment

In addition to responding to assessment data, you should also examine your long-term plan to ensure that it closely aligns with your big goal and end-of-the year assessment. Your plan, assessment, and big goal are only meaningful if they all work in concert toward a shared end. When they align, these tools are more likely to ensure high levels of instructional rigor and student mastery. Remember, when grouping learning goals into units (Step Two) and sequencing units over time (Step Three), you ensure that these actions lead students to achieve the big goal. These are the first steps toward ensuring that your long-term plan is aligned. However, it is still important to step back and double check – both at this point and throughout the year – whether the details of your long-term plan synch with your ultimate goal and measurement tools. To help do this, reflect on the following questions:

- Will this plan get your students to your big goal?
- How did you use your big goals and summative assessments to inform your long-term plan?

- Given your big goal, which concepts hold a high priority, and does your long-term plan reflect this prioritization?
- How will your long-term plan help you think about remediation and extension to ensure mastery of the big goal?

Think critically as you answer these questions and tailor your long-term plan accordingly to maximize the cohesion among your instructional tools.

III. FAQs on Long-Term Planning

Now that you have a sense of the structure and purpose of the long-term plan, you may have several questions. While the long-term plan is an immensely helpful tool, it is also an inherently blunt instrument. Remember that the long-term plan takes a big-picture look at the year. The more subtle adjustments are made during unit and lesson-planning. Let's address some of those more subtle aspects here.

Q: ***What is more important – ensuring that my students achieve the standards and learning goals on my long-term plan or ensuring that they do well on standardized tests?***

A: While many districts and states have aligned their tests and standards, some have not. The most important thing is that your students meet their grade-level or content-area standards. If they do, regardless of whether there is direct correlation between the standards and what is tested, it is very likely that your students will make significant progress on standardized tests. Still, there's more you can do to prepare your students for success on these tests. As you know, how your students do on these tests can determine whether they're promoted, whether they qualify for advanced tracks, and whether they qualify for special schools. Like it or not, standardized test scores make a real difference in students' lives. We suggest that you become as familiar as you can with the tests so that you'll know which of your standards are tested, how they are tested, and what your students need to know that is not included in the standards. Some districts and states do this for you, but in other areas you'll need to take the initiative to do it yourself. You might consider taking past samples of the test yourself, checking out the objectives for the test, and consulting with other teachers about what is on the test and how students are tested.

Q: ***Couldn't we have students in our class who are below and others who are above grade level, and how will our long-term plan, which is based on grade-level standards, help us in that situation?***

A: You may discover that students in your classroom are at all different academic levels. Several of your students may be below grade level. A few may be far below grade level. This discovery may be overwhelming, but we hope it is also motivating. Catching your students up is exactly why you are here. You may also determine that some of your students are at grade level or even above grade level in various skills. That's great, and it means that you can push them to even higher levels of achievement. However, neither of these scenarios means that you have to throw out your long-term plan. Use the guidance in this chapter to tailor your long-term plan to meet the different levels and needs of students.

Q: ***What should I do if my school's curriculum already has a plan that outlines what I will be teaching every day? This means I don't have to worry about long-term planning, right?***

A: ALL teachers, regardless of whether they receive a curriculum from their school, need to think critically about what their students need to learn, how best to create, group and sequence learning goals, and how to adjust their plans to meet the needs of their individual students (the

steps in the long-term planning process). If you blindly follow a scripted curriculum (or any pre-made instructional tool) without tailoring it to fit your class, you will likely lose focus on your purpose in reaching the big goal. If your school uses a scripted curriculum, closely analyze its structure to determine why it chose a particular learning goal sequence. Is there a logical progression among standards and units? Are some goals prerequisites for others, and if so, are they sequenced appropriately? Further, think about how the curriculum fits the needs of your class. Is there a place for teaching background knowledge and skills, sufficient review for challenging goals, and enrichment? It is your responsibility to ensure that the curriculum accounts for your students' different academic levels. Make the tool work for your class by adjusting and modifying it appropriately. Again, this reflection process is not limited to analyzing scripted curricula. You should take these steps to critically evaluate *any* tool you use during the year, whether it is pre-made or of your own design.

Q: ***What if my school's curriculum includes learning goals that are repeated in several different units throughout the year? How does this affect my long-term planning?***

A: Some curricula repeat or "spiral" learning goals throughout the year to help reinforce important knowledge and skills. A secondary science curriculum, for instance, may repeat the goal for students to apply the scientific method during several units. Everyday Math and Open Court Reading, on the other hand, are examples of spiraling curricula comprised entirely of ongoing learning goals. If your curriculum repeats learning goals in different units, you still need to check that these goals are grouped and sequenced logically throughout the year. Use the guidance in this chapter to evaluate the order of your curriculum's learning goals, ensuring that the sequence always leads students to master the big goal. You will also need to do this when ordering your objectives, a topic covered in the next chapter (on unit planning).

Q: ***Does the long-term planning process apply if I have students receiving special education services?***

A: Of course. Some would say even more so. We'll dive into greater detail about planning instruction for special education students in Chapter Eight. However, you should note that long-term plans for students with special needs may be more intricate than those described in this chapter but serve exactly the same purpose – to function as a plan and as documentation of the year's learning goals. (In fact, one might consider the Individual Education Programs (IEPs) required for students with special needs to be formalized long-term plans.) In some instances, you may need to utilize different standards for different students, or you may utilize standards for a variety of grade levels. As we'll discuss, there are structures and people to help you with these challenges.

Q: ***This all sounds really challenging.***

A: This *is* really challenging. And exciting.

Conclusion and Key Concepts

A long-term plan is an absolutely essential tool for achieving significant academic gains for your students. Like a map, or a blueprint, it establishes where you are headed and how you are going to get there. The steps are relatively simple:

Step One: Use the standards to determine learning goals

- Standards are presented in a range of detail and specificity. Generally speaking, "standards" are relatively general statements of what students should learn, while "learning goals" are one level more specific. Digest your state standards and create learning goals if they are not already provided. This will help to develop your vision of what students need to master by the end of the year, a process you began in earlier chapters.

Step Two: Group learning goals into units

- Once you have the learning goals in front of you, you need to group them into smaller "units" based on some type of commonality. You should begin to think critically about how long it will take to teach the knowledge and skills from each unit.

Step Three: Logically order the units and plot them on the school calendar

- After grouping your units, use a similar thought-process to sequence these units and assign them to a period of time on the school calendar. Make sure to build in time for remedial and enrichment learning goals, as well as room for contingencies.

Step Four: Continually adjust your plan

- The final step of the long-term planning process is to consistently update your plan. Adjust the document to respond to ongoing assessment data about your students and to closely align it to meet the purpose of your big goal.

This process will do wonders for immediately improving your teaching and impacting your students' achievement. Having a long-term plan will give you the perspective you need to make critical decisions about how you use your valuable time with your students.