IT for Education

STANDARD OPERATING PROCEDURE

Principal's AI Assistant
Claude

7 procedures · setup, assistants, email, briefing, scheduling, newsletter, newsletter skill

SOP: Principal's AI Assistant — Claude

Nov 11, 2026 · @Carlos · IT for Education · Version 1.1

> **Before you use this guide:** it is shared free, for information only, and your school remains responsible for following all laws and policies that apply to it and for reviewing every AI output. Read the **Disclaimer and terms of use** at the end.

Before you start

These seven procedures set up Claude as a principal's assistant for email, scheduling and the weekly newsletter, using the free Claude for Teachers plan.

Who it's for: principals, assistant principals and office managers at U.S. K–12 schools. Steps marked **(Admin)** are for whoever manages the school's Claude organization or Google/Microsoft admin.

Pick a procedure

SOP	What it fixes	Level	Data level
1	Getting the school account ready	Start	None
2	Saved assistants for parent emails and polishing your writing	Build	Yellow
3	Answers about your own email, calendar and files	Start	Yellow
4	The morning inbox scramble: briefing plus draft replies	Automate	Yellow
5	Walkthrough rotations, the Monday bulletin, meeting times	Build	Yellow

SOP	What it fixes	Level	Data level
6	The Friday newsletter, built from items collected all week	Build	Green
7	The same newsletter, using our ready-made skill	Build	Green

Start = use AI by hand. **Build** = save an assistant you reuse. **Automate** = it runs on a schedule. Data levels match the safety rules table below.

What you need

- Your school email address (for verification), age 18 or older
- A school Gmail/Google Calendar or Outlook account to connect
- 20 minutes for setup, then 2–5 minutes a day

Use Claude for Teachers, not a personal account. It's free for verified U.S. K–12 staff, including school administrators, and conversations aren't used to train models. Your account moves onto a free Claude for Teams plan with FERPA-aligned protections.

Safety rules: what can go into AI

Green: go ahead	Yellow: school account only	Red: never
Newsletters, public school news	Internal staff memos	Student names with grades, discipline or health
Lesson ideas, pacing, rubrics	Parent emails, read through your connected school account	IEP, 504 or counseling details
Polishing your own writing	Schedules and calendars	Custody, family finances, tuition aid
Agendas and templates	De-identified data	Passwords or ID numbers

You review every draft before anything is sent.

Presentation walkthrough: your morning briefing in 4 steps

This is the conference demo, step by step: connect your apps, draft replies, use several apps in one request, then run it every weekday at 7:00 a.m. Each step points to the full SOP below.

Step 1: Connect your apps (2 minutes)

Open **Settings → Customize → Connectors** and connect **Gmail**, **Google Calendar** and **Google Drive** (or **Microsoft 365** for a Microsoft school). Full steps and a screenshot: SOP 3.

Step 2: Generate email drafts

```
Look at my unread emails from the last 24 hours. For each email that needs a reply from me, draft a short, warm, professional reply. Do not send anything.
```

Claude's Gmail connector can create drafts; Claude asks for your approval before it takes the action. Review each draft in your Gmail **Drafts** folder before sending.

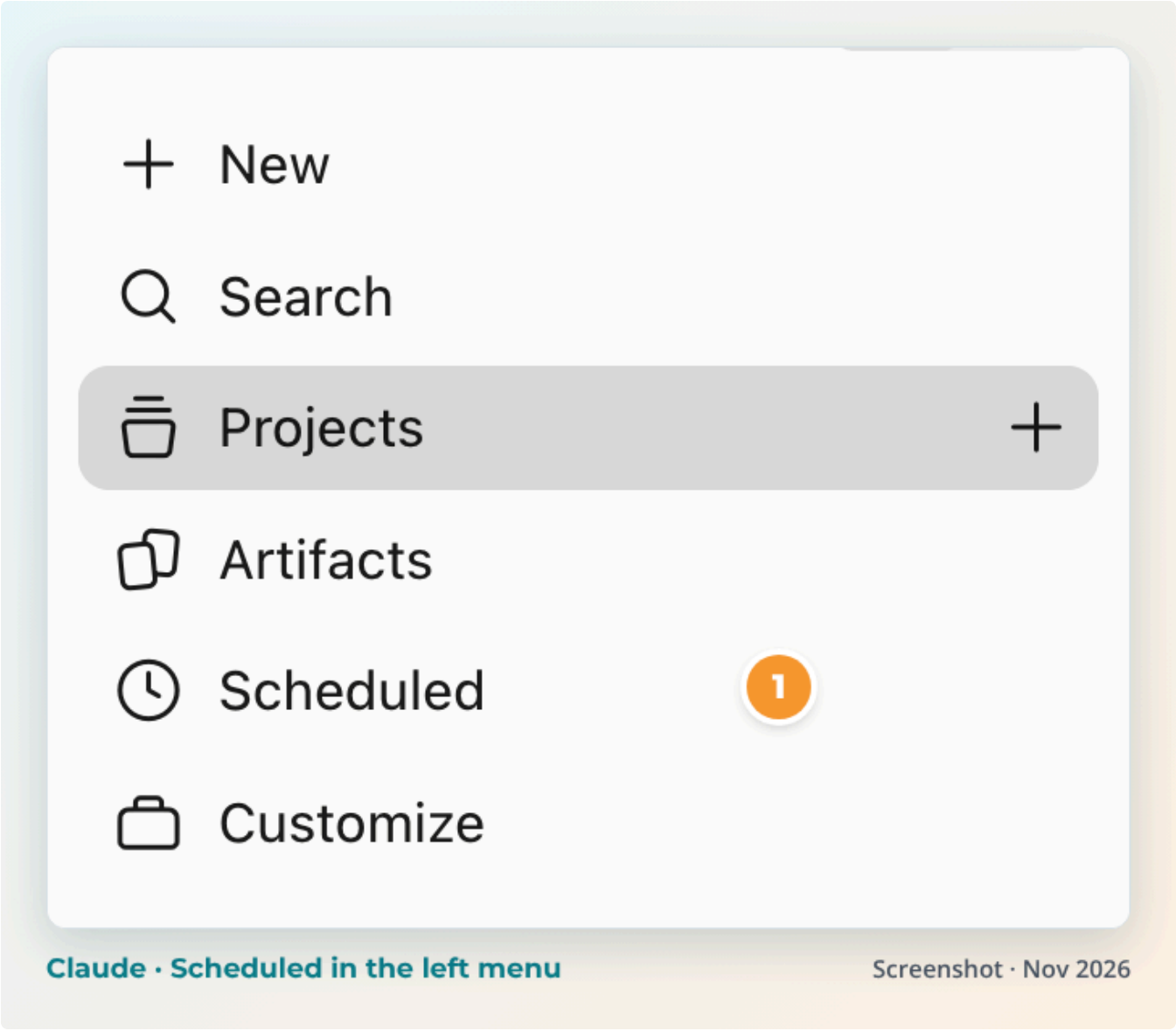
Step 3: One prompt, several apps

This single request uses Gmail, Calendar and Drive together:

```
Good morning. Using my email, calendar and files:
1) List today's meetings with times and link any related files.
2) Flag emails since 3 p.m. yesterday that need me today.
3) Draft a short, warm reply to the 3 most important emails. Don't send anything.
4) End with a 3-line summary I can read in 30 seconds.
```

Step 4: Run it every weekday at 7:00 a.m.

1. Click **Scheduled** in Claude's left menu.
2. Create a new task, set it to run on **weekdays at 7:00 a.m.**, and paste the Step 3 prompt.
3. Each morning, read the briefing and review the drafts waiting in Gmail before sending any of them.
4. Don't see **Scheduled**? Run the Step 3 prompt by hand each morning (SOP 4, Option A).



Remember: AI drafts, you decide. Nothing is sent without you.

SOP 1: Set up Claude for Teachers

Each staff member can verify individually, or the school can set up one managed account for everyone.

Principal steps (individual)

1. Go to **claude.com/solutions/teachers** and choose to get started as an educator.
2. Sign in, or create an account, with your **school email**.
3. Complete the K–12 educator verification. Have your school name and role ready.

4. After verification, your account switches to the Claude for Teachers plan. Check **Settings → Billing/Plan** to confirm.

Admin steps (school-wide, optional)

1. The person authorized to set up technology for the school goes to **claude.ai/k12districts** using a school email.
2. Confirm authorization and accept the U.S. K–12 Terms of Service, Public Sector Addendum and Data Processing Agreement.
3. Invite staff, and set up SSO and roles if wanted.
4. In **Organization settings → Connectors**, turn on the connectors staff will use (Gmail, Google Calendar, Google Drive, or Microsoft 365). On Team plans, staff can't connect them until an Owner does this.

Done when: you're signed in with your school email and your plan shows Claude for Teachers.

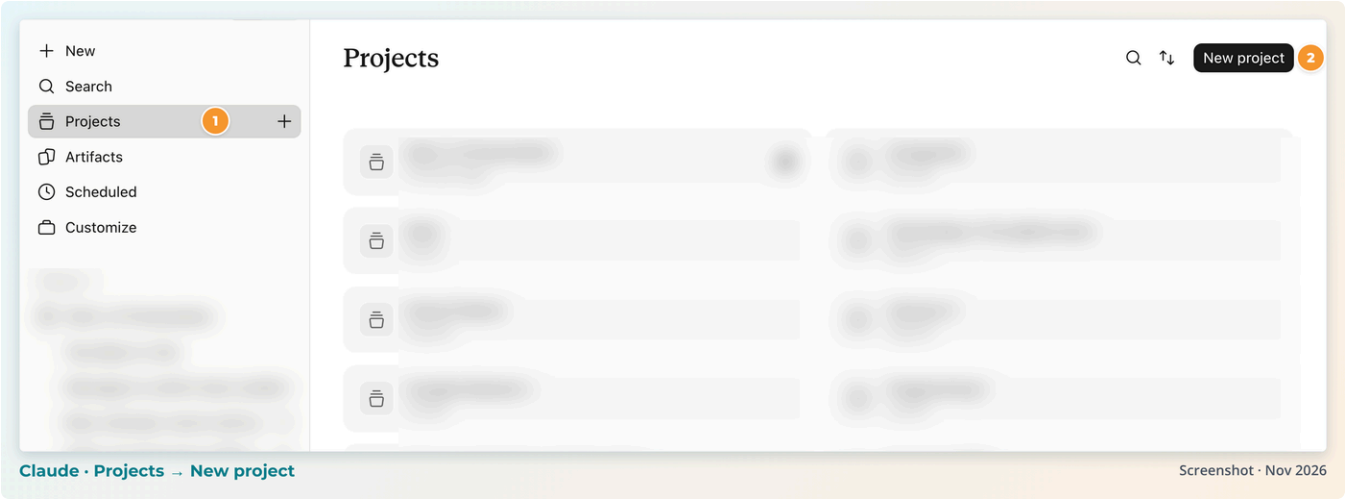
SOP 2: Create assistants from prompts (Projects)

Data level: Yellow. The Parent Email Helper reads a parent's emails through your connected school account (SOP 3), so never use a personal account. Never add student records to a project's files.

A Claude Project is a workspace with its own instructions and files, so every chat started inside it follows the same rules. Claude also has **Skills** (Settings → Customize → Skills) for reusable instructions, but Projects are the simplest place to start.

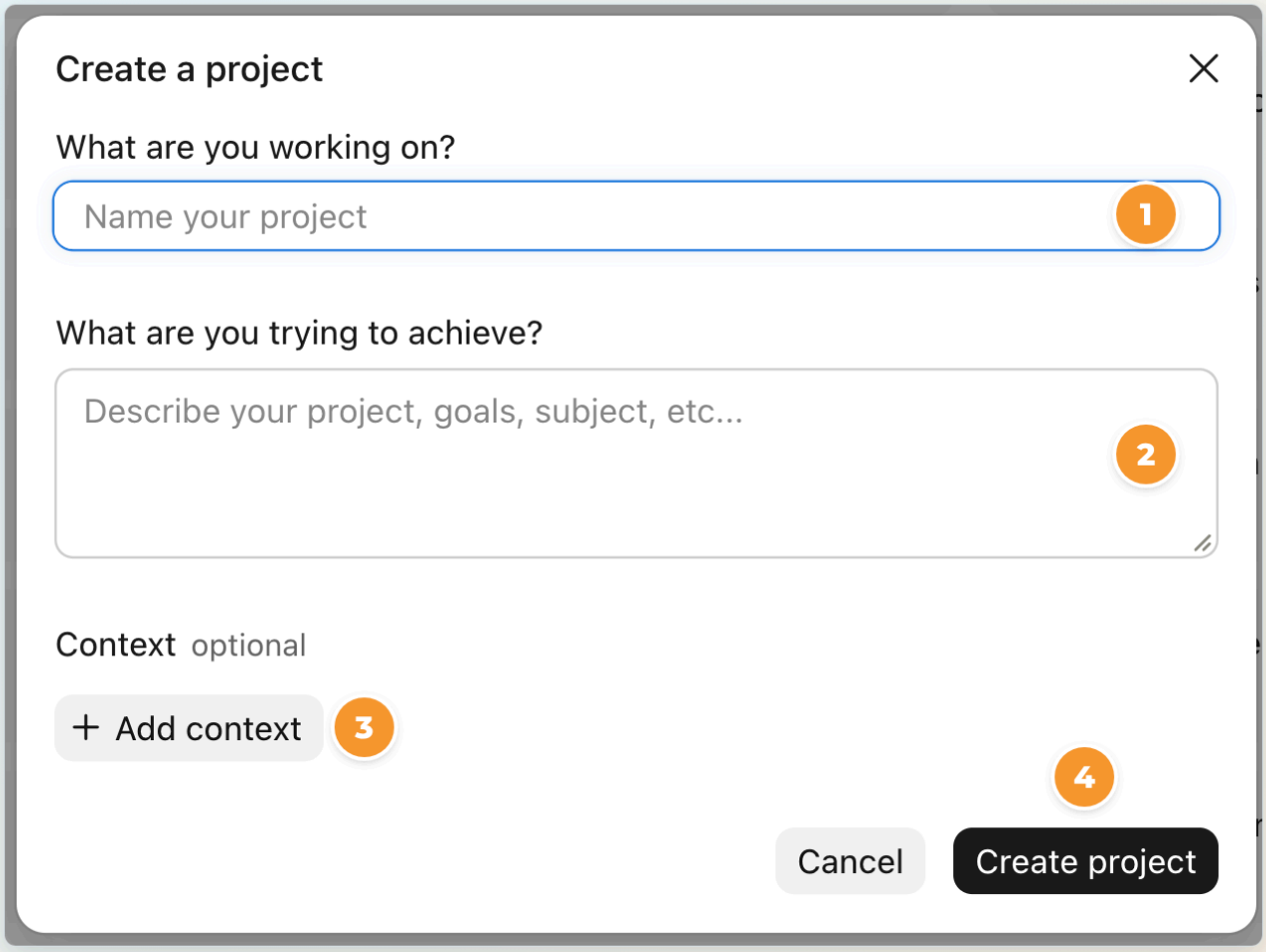
Create a Project

1. Click **Projects** in the left menu, then **New project** (top right).
2. **What are you working on?** Name it, e.g. *Parent Email Helper*.
3. **What are you trying to achieve?** One line, e.g. "Draft warm, clear replies to parent emails."
4. Optional: **Add context**, such as your newsletter template or a writing sample. No student records.
5. Click **Create project**.
6. Inside the project, open the instructions and paste one of the prompts below (or from SOP 5–6). Replace every [bracket].
7. Start every new chat from inside the project. On a Teams plan, use **Share** to give it to staff.



Claude · Projects → New project

Screenshot · Nov 2026



Claude · Create a project

Screenshot · Nov 2026

Writing a good assistant prompt (any platform)

- **Role:** who it is ("communications assistant for [School Name], a Catholic school")
- **Input:** what you'll give it (notes, a parent's name to look up in your inbox, a class list)

- **Output:** the exact format, length and sections
- **Rules:** keep my voice, never invent dates, mark gaps with [CHECK], no student last names

Starter assistants in this kit

Assistant	Prompt is in
Friday Newsletter Builder	SOP 6
Morning Inbox Briefing	SOP 4
Walkthrough Planner, Calendar to Reminders	SOP 5
Parent Email Helper	Below
Write It, Then Polish It	Below

Parent Email Helper (project instructions)

```
I am the principal of [School Name], a Catholic school. When I name a person, search my connected email (Gmail or Outlook) for their emails from the last [7] days and read the most recent thread.
1. Summarize in 3 bullets what they are actually asking for or worried about.
2. List facts I should check before replying.
3. Describe the tone in one line.
4. Draft a reply under 150 words: warm, respectful, clear. Acknowledge the concern, say what the school will do next, and promise nothing I haven't decided. Put [brackets] where I need to add a decision.
Never send anything. If you find no emails from that person, tell me and stop.
```

Try it. With your email connected (SOP 3), open a chat in the project and type a request like this, using a real parent's name:

```
Check my email for messages from [parent's name] in the last 7 days.
Summarize what they need and draft a reply I can review. Don't send anything.
```

Write It, Then Polish It (project instructions)

```
I will paste a draft I wrote. Polish it but keep my voice and keep it no
longer than my original.
- Fix grammar and make it clearer.
- Audience: parents (warm tone) or staff (direct, friendly tone). I will say
which.
- Where it fits naturally, connect the message to our Catholic values in one
or two sentences. Don't preach.
Show the polished version, then list the main changes.
```

Done when: the project appears in your sidebar and gives a good answer on a real example.

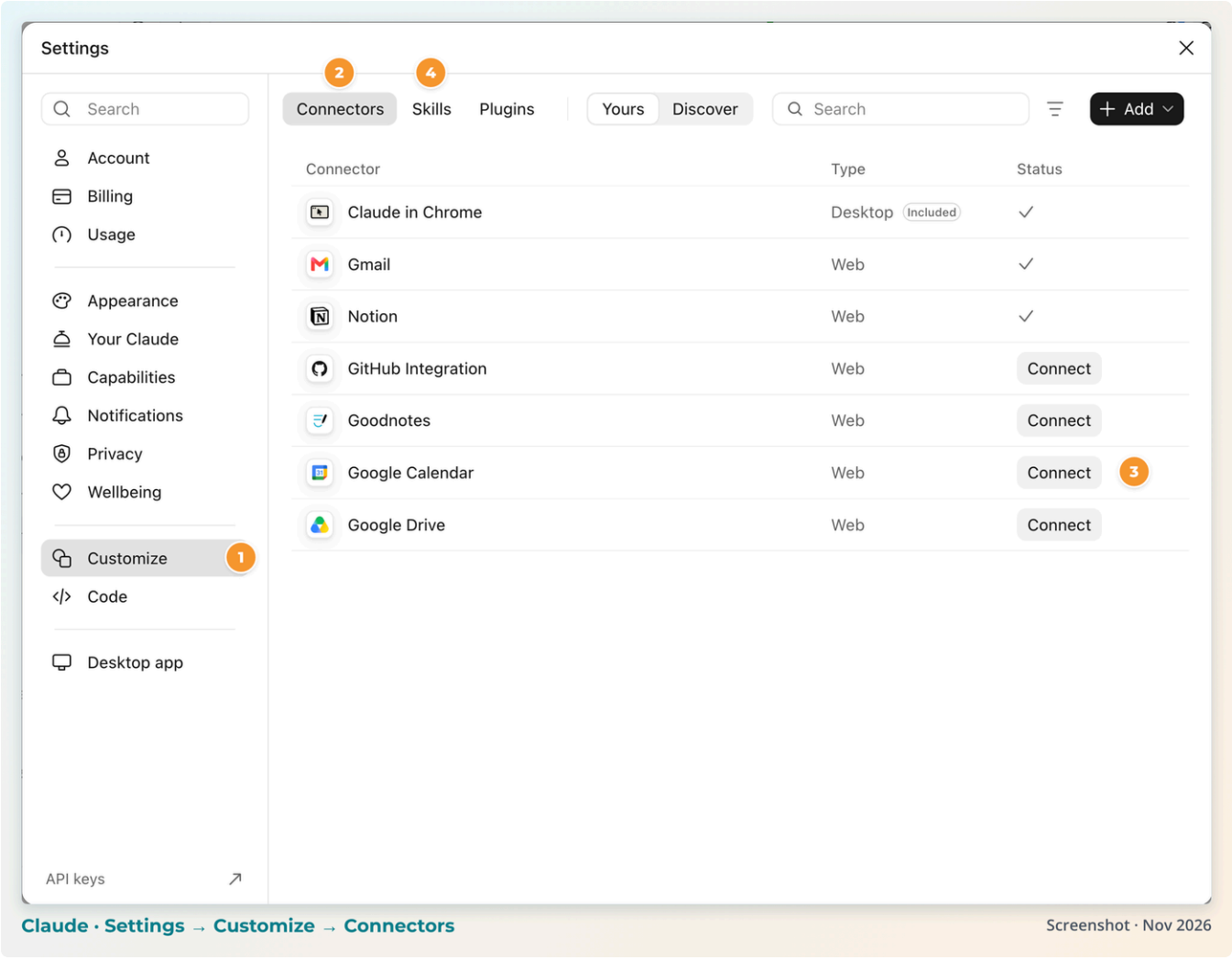
SOP 3: Connect email, calendar and files

Data level: Yellow. Connect only your school accounts, never personal ones. Don't copy IEP, health or discipline details from your mail into other chats.

Connectors let Claude search and summarize your own mail, calendar and files. By default they read and draft; you send everything yourself.

Google school (Gmail, Google Calendar, Google Drive)

1. Click your name (bottom left) → **Settings → Customize**, then the **Connectors** tab. (**Customize** in the left menu goes to the same place.)
2. Find **Gmail**, **Google Calendar** and **Google Drive** and click **Connect** on each. Connected apps show a check mark.
3. Sign in with your **school** Google account and approve the permissions.
4. See "Access blocked: your institution's admin needs to review Claude"? Your Google admin must allow Claude as a trusted app **(Admin)**.
5. On a Teams plan, if the connectors don't appear, an Owner must turn them on first (SOP 1, admin step 4).



Claude · Settings → Customize → Connectors

Screenshot · Nov 2026

Microsoft school (Outlook, Calendar, OneDrive, Teams)

1. **(Admin)** An Owner adds **Microsoft 365** under **Organization settings → Connectors**, and the Microsoft 365 admin grants consent in the school's Entra tenant.
2. Then each user: **Settings → Customize → Connectors → Microsoft 365 → Connect** and sign in with the school Microsoft account.
3. By default it's read-only. Sending mail or creating calendar events only works if the admin turns on write tools.

Use them in a chat

Just ask. Claude picks the right connector. You can turn individual tools on or off from the tools menu in the chat box.

Try these first

```
Find the email I sent the PTO president about the fall festival in September.
```

```
What's on my calendar this week, and where are the gaps longer than 30
minutes?
```

```
Find the newest version of the faculty handbook in my Drive and list the
dress code rules.
```

Done when: Claude answers a question about your own inbox correctly.

SOP 4: Daily briefing

Data level: Yellow. The briefing reads your school inbox and only drafts replies. You review and send each one yourself.

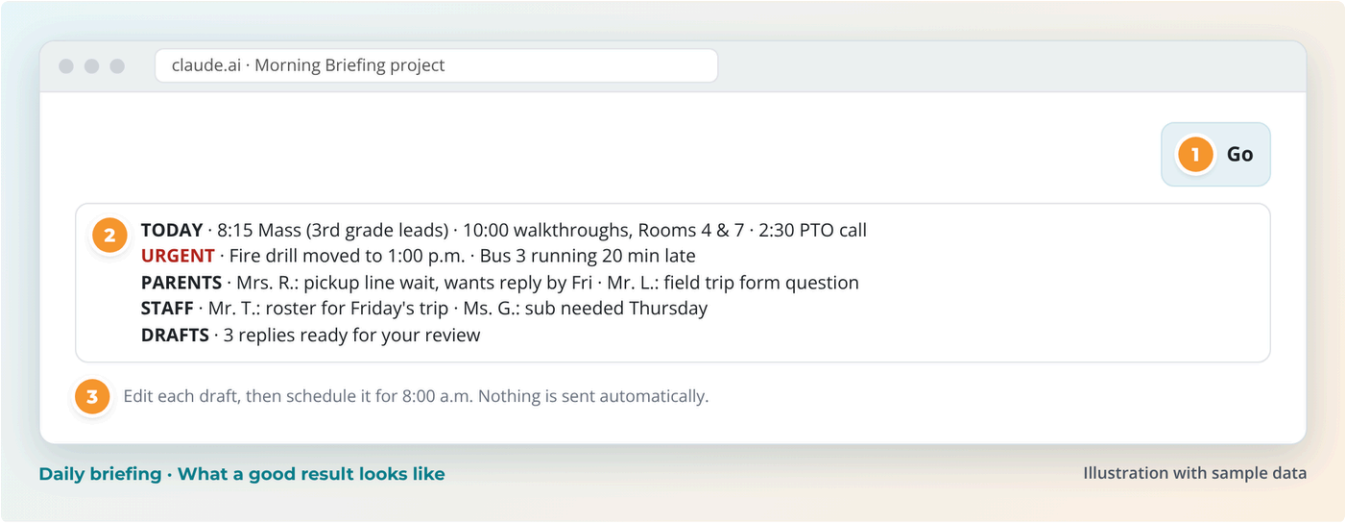
With email and calendar connected, one saved prompt gives you the whole morning in under a screen. You still decide what gets answered.

Option A: run it by hand (works for everyone)

1. Create a project called **Morning Briefing** (SOP 2) and paste the briefing prompt as its instructions.
2. At 7:15 a.m., open a new chat in that project and type *Go*.
3. If your email connection allows it, ask Claude to *save the 3 replies as Gmail drafts*. Otherwise copy them into your email. Edit, then schedule them for 8:00 a.m.

Option B: make it automatic (if your plan offers scheduled tasks)

1. Click **Scheduled** in Claude's left menu and create a new task.
2. Set it to run on **weekdays at 7:00 a.m.** and paste the briefing prompt below.
3. Each morning, open the result in Claude, then review any drafts in your email before sending.
4. If **Scheduled** doesn't appear on your plan, use Option A.



Daily briefing · What a good result looks like

Illustration with sample data

Briefing prompt

```
[1] YOUR ROLE
You are my principal assistant. I am the principal of [School Name]. My time
with teachers and students matters most, so protect it. Put school
operations, people, student needs, family communication, deadlines, and risk
ahead of low-value administrative noise.

[2] WHERE TO LOOK
Every morning at 7:00 AM, review:
- My email inbox (Gmail or Outlook) for the last 24 hours
- My calendar for today and the next 7 days
Ignore vendor marketing, newsletters, promotions, and sales outreach unless
they require a deliberate school decision.

[3] WHAT TO INCLUDE
Deliver a clear, scannable School Principal Morning Briefing with:
1. Top priorities: rank the most urgent and important items, explain why each
matters today, and state the next action.
2. Pending tasks: tasks, commitments, deadlines, and unanswered questions
from emails and meetings.
3. New issues: student/family, staffing, safety, facilities, compliance,
financial, or reputational issues that need my attention.
4. Today's schedule: meetings and events, preparation needed, conflicts, and
decisions or follow-ups that should result.
5. Upcoming holidays and key dates in the next 7 days.
6. Suggested delegation: what can be handed off and to which role (assistant
principal, front office, counselor/student services, HR,
operations/facilities, business office, or another role clearly named in the
source).
```

```
7. Draft replies: short, ready-to-review drafts only for messages that need a
response today.

[4] YOUR LIMITS
- Draft and suggest, but do not send, delete, move, accept, or change
anything.
- Show the source for every item (sender + subject, or calendar event +
time).
- Do not invent names, roles, or responsibilities that the source material
does not support. If something is unclear, say so.
```

Done when: you've used the briefing for 5 school days and adjusted the prompt (e.g., "shorter," "skip newsletters").

SOP 5: General scheduling

Data level: Yellow. Teacher names, rooms and schedules are fine. Leave student names out of rotations and checklists.

Three reusable projects cover the recurring scheduling work: walkthrough rotations, a Monday staff bulletin from the calendar, and finding meeting times.

5a. Walkthrough Planner (save as a Project)

```
Create a 2-week classroom walkthrough rotation.
Classes: [grade, teacher, room for each class]
Visit [2] classes per grade per week, [15] minutes each, only between
[times]. Avoid [lunch, specials, Mass].
Don't visit any room twice until every room has been visited once.
OUTPUT
1) A table by day and time.
2) A one-page printable checklist per visit: date, teacher, focus (learning
objective posted, student engagement, Catholic identity visible), notes line.
```

Ask Claude to *make the checklist a printable document*. With Google Calendar connected, ask *Add these visits to my calendar as 15-minute events* and approve each one. Otherwise ask for *an .ics calendar file* and open it to import the visits.

5b. Calendar to Reminders (weekly)

```
Look at my calendar for the next two weeks.
Write 1) a Monday staff bulletin: what's happening each day and what staff
need to prepare; 2) a short reminder for families, only for events that
affect parents.
Don't add events that aren't on the calendar. If a time or place is missing,
write [CHECK].
```

If the calendar isn't connected, paste the events (or upload the diocesan calendar PDF) instead.

5c. Find a meeting time

```
Find three 30-minute slots next week when I'm free between 8:00 a.m. and 3:00
p.m., avoiding Mass on Friday morning.
```

Done when: this week's walkthroughs are on your calendar and the Monday bulletin is drafted.

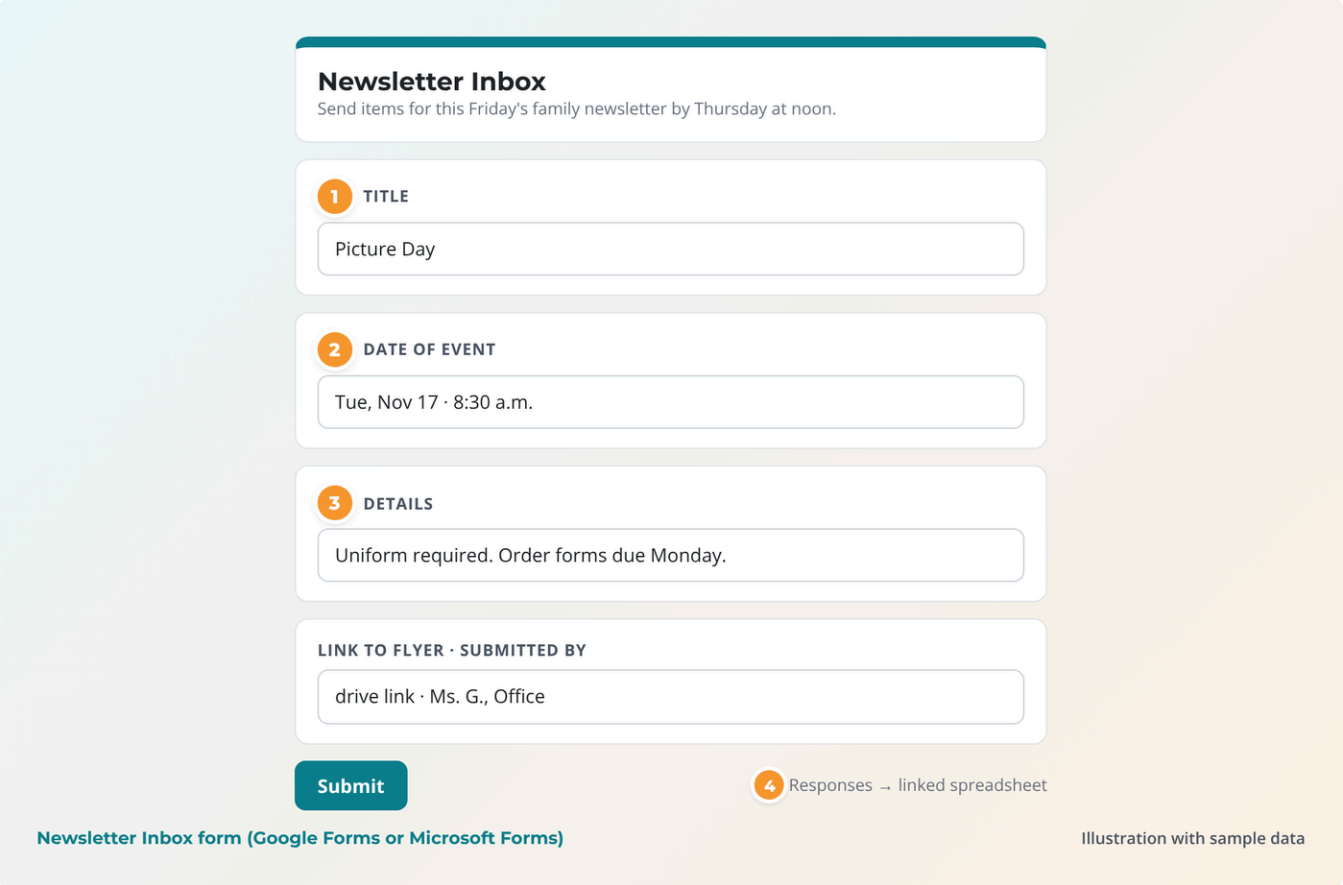
SOP 6: Weekly newsletter

Data level: Green. Newsletter content is public school news. Use first names only for student shout-outs, and follow your school's photo and permission policy.

Items collected all week plus one saved project turn the Friday-morning scramble into a 10-minute review on Thursday afternoon.

Step 1: Collect items all week (one-time setup)

1. Create a **Newsletter Inbox** form in Google Forms or Microsoft Forms with fields: Title, Date of event, Details, Link to flyer, Submitted by.
2. Link responses to a Google Sheet or Excel file.
3. Share the form link with staff. Add your own items during the week.



Newsletter Inbox form (Google Forms or Microsoft Forms) Illustration with sample data

Step 2: Create the Newsletter Builder project (one time)

Follow SOP 2 and paste these instructions. Add last year's best newsletter to Project knowledge so it learns your format.

```
You are the communications assistant for [School Name], a Catholic school.
Each week I will give you rough notes, pasted form responses, photos of
flyers, or a voice-memo transcript. Turn them into our family newsletter.
FORMAT
1. Greeting (2-3 sentences). Reflect our Catholic faith naturally when it
fits: the liturgical season, a saint of the week, or a short Scripture verse.
2. "This Week at [School Name]": short highlights.
3. "Coming Up": a dated list (day, date, event, what families need to do).
4. "Reminders and Notices": forms, picture day, dress code, etc.
5. A short blessing, then my name and title.
RULES
- One page. Plain, warm language for busy parents. Keep my voice.
- Never invent dates, times, prices or details. If something is missing,
write [CHECK] and list your questions at the end.
- No student last names or private information.
AFTER THE NEWSLETTER ALSO GIVE ME
a) A 3-line version for staff.
b) If I ask, a translation for families (keep dates and names exactly as
written).
```

Practice first with sample notes. No real items yet? Paste these fictional notes to see how it works. The book fair has no times on purpose, so you'll see a [CHECK] question.

```
Riverside Prep: newsletter notes, week of Nov 16 (fictional practice sample)
- Picture day moved to Thursday, Nov 19, 8:30 a.m. Full uniform.
- 5th grade food drive for the parish pantry. Canned goods by Friday, Nov 20.
- No school Wednesday to Friday, Nov 25-27 (Thanksgiving).
- Advent Mass for families Monday, Nov 30, 9:00 a.m., in the church.
- Shout-out: Mrs. R's 3rd grade read 1,000 books this quarter!
- Book fair in the library Dec 2-4. Cash or card.
```

Step 3: Build it each week (Thursday, 10 minutes)

1. Open a new chat inside the Newsletter Builder project.
2. Paste the week's form rows (or, with Google Drive connected, ask it to read the sheet), add rough notes, and attach photos of paper flyers.
3. Answer every [CHECK] question.
4. Ask for changes in plain words: *shorter*, *warmer opening*, *move picture day to the top*.
5. Copy into your newsletter template, proofread once, and schedule it for Friday.

Already write it yourself? Use *Write It, Then Polish It* (SOP 2): you write, Claude only cleans it up.

Done when: one newsletter has gone out with the project's help and you've noted what to change in the instructions.

SOP 7: Generate the newsletter with the IT for Education skill

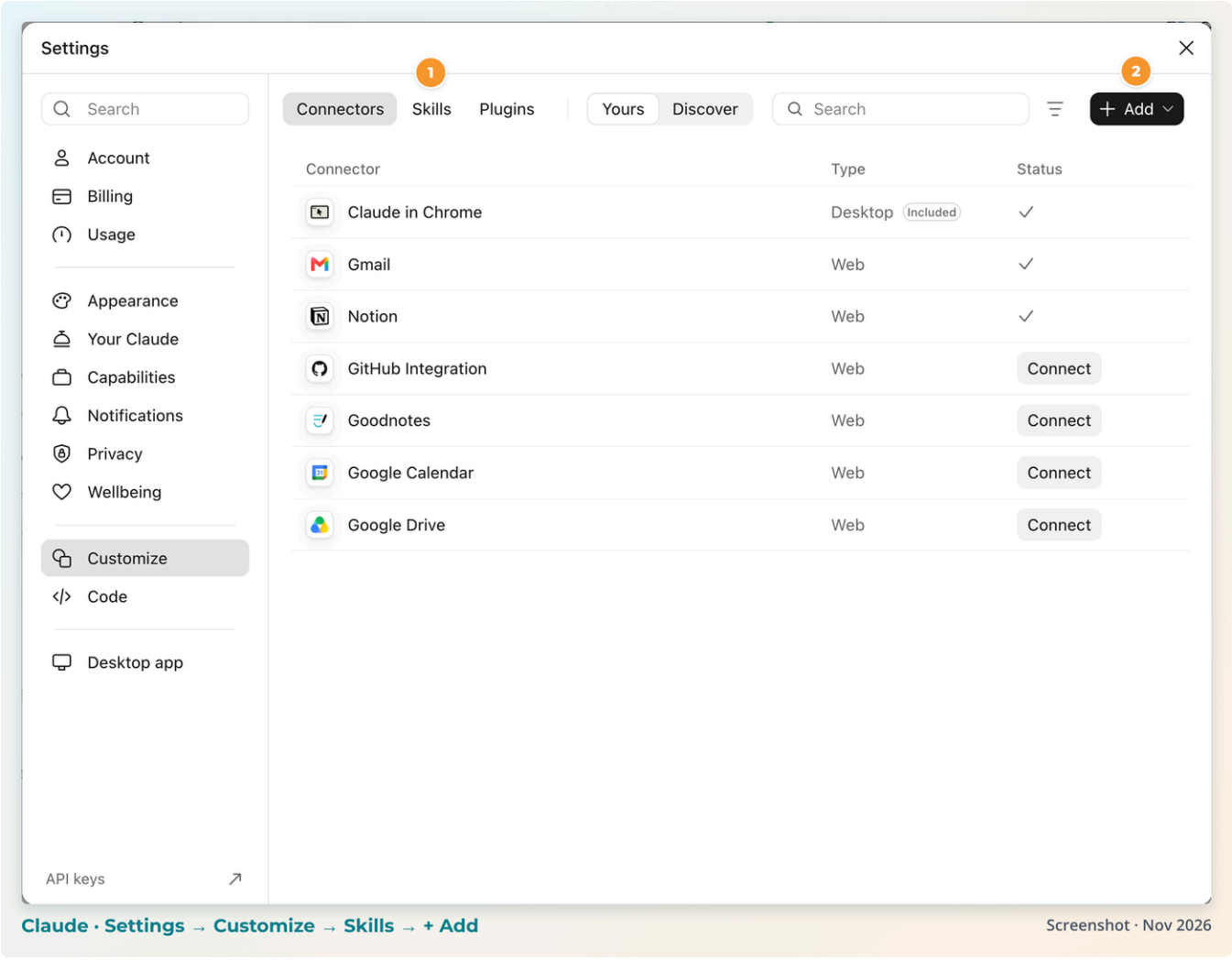
Data level: Green. Same rules as SOP 6: public school news, no student last names or private family details.

Instead of building the Newsletter Builder yourself (SOP 6, Step 2), you can upload the ready-made skill IT for Education built and tested. It takes about 5 minutes once, then each newsletter starts from one request.

Download: Newsletter Generator skill file. Save it to your computer as it is; don't unzip it.

Install it (one time)

1. In Claude, click your name (bottom left) → **Settings → Customize**, then the **Skills** tab.
2. Click **+ Add**, choose the upload option, and select the file you downloaded.
3. Make sure the skill is turned on. Open it to read the instructions and update anything specific to your school (name, tone, sections).
4. Skills tab missing or grayed out? Turn on **Code execution and file creation** under **Settings → Capabilities**. On a Teams plan, an Owner may need to allow skills first.



Claude · Settings → Customize → Skills → + Add

Screenshot · Nov 2026

Generate this week's newsletter

1. Start a new chat.
2. Type *Create this week's family newsletter* and add the week's items: paste your Newsletter Inbox responses (SOP 6), type rough notes, or attach photos of paper flyers. Claude runs the skill because your request matches its description.
3. Answer any questions it asks, and fix every item marked [CHECK].
4. Read the whole draft. Check each date, time, name and price against your calendar before sending.
5. Copy it into your newsletter email or template and schedule it.

Example request. This is the request we use in the demo. Copy it and swap in your own items:

```
Generate this week's newsletter

Faith & Community
1. Thanksgiving Food Drive: Bring canned goods and non-perishables through
Friday, Nov 20. Everything goes to the parish food pantry. The class that
collects the most wins a pizza party.
2. All-School Mass: Wednesday at 9:00 a.m. The 5th grade leads the liturgy.
Parents are welcome.
3. Advent begins Nov 29: Each family will get an Advent prayer calendar in
their child's folder next week.

Academics
4. Science Fair registration: 6th-8th grade project proposals are due Dec 4.
Forms are on the school website.
5. Spelling Bee winners: Congratulations to our classroom winners. They go on
to the school bee on Dec 10.
6. MAP testing complete: Fall results will go home with report cards.

Student Life
7. Student Council: Thank you to everyone who voted. Meet your new officers
on page 2.
8. Basketball tryouts: Boys' and girls' tryouts are Monday and Tuesday, 3:15-
4:30 p.m., in the gym. Students need a signed physical form.
9. Spirit Day Friday: Students may wear jeans with their school spirit shirt
for a $1 donation to the food drive.

Important Dates & Reminders
10. No school Nov 25-27: Thanksgiving break. Classes resume Monday, Nov 30.
11. Early dismissal Tuesday, Nov 24: Dismissal is at 12:30 p.m. There is no
after-care that day.
12. Lost & Found: Unclaimed items will be donated on Nov 24. Please check the
table by the front office.
13. Carpool reminder: Please stay in your car and keep the drop-off lane
moving. Thank you for your patience!

Thank You
14. Volunteer shout-out: Thank you to the HSA parents who organized last
week's Fall Festival. It raised $4,200 for new library books.
```

Done when: the skill shows under Settings → Customize → Skills and you've produced and reviewed one newsletter with it.

Troubleshooting and sources

Problem	Fix
Verification fails	Use your school email, not a personal one; you must be 18 or older.
"Access blocked: your institution's admin needs to review Claude"	Your Google admin must allow Claude as a trusted app.
Connectors don't appear	On a Teams plan, an Owner must enable them in Organization settings → Connectors.
Microsoft 365 won't connect	It needs a school (Entra) account and admin consent; personal @outlook.com accounts can't connect.
Output too long or not your voice	Add a sample of your writing to Project knowledge and say "keep under one page."

Screens and menu names change often. Check against the sources below before each training.

Sources (checked Nov 4, 2026)

- Claude for K-12 teachers (Anthropic)
- Getting started with Claude for Teachers (Anthropic)
- Claude for Teachers eligibility and plan (Claude Help Center)
- Set up Claude for Teachers for your school or district (Claude Help Center)
- Use Google Workspace connectors (Claude Help Center)
- Connect to Microsoft 365 (Claude Help Center)

Next step: a free AI Readiness Assessment

Attended FCAC 2026? Your school's AI Readiness Assessment from IT for Education is complimentary. We review which AI tools your staff already use, how your accounts and data settings are configured, and where your policies have gaps. You get a report with clear next steps.

Book it: call 305-403-7582 or visit itforedu.com.

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Last updated: November 13, 2026

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Before implementing any recommended tool, integration, automation, or workflow, users should obtain all necessary institutional approvals and verify compliance with applicable laws, contractual obligations, internal policies, and technology requirements.

3. Student privacy and confidential information

Schools must protect student, family, employee, and institutional information.

Do not upload, disclose, or connect personally identifiable student information, educational records, health information, special education records, disciplinary information, financial records, credentials, or other confidential information to an AI service unless the institution has expressly authorized the specific use, established appropriate contractual and technical safeguards, and verified compliance with applicable requirements.

Relevant requirements may include FERPA, COPPA, CIPA, applicable state privacy laws, and institutional or diocesan policies, depending on the circumstances.

4. Human oversight and decision-making

Artificial intelligence systems can generate inaccurate, incomplete, biased, misleading, or inappropriate content.

All AI-generated materials must be reviewed by an appropriately authorized person before being communicated, published, or used.

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Instructions and screenshots reflect product interfaces available as of November 2026. AI services change frequently, and users should verify current instructions, security settings, licensing requirements, and product capabilities through official vendor documentation.

IT for Education may update these materials without prior notice.

9. Information entered in this guide

The interactive version of this guide saves your school name and checkmarks only in your own web browser. This information is not sent to IT for Education or anyone else, and clearing your browser data removes it.

10. Connected accounts and automated tasks

Connecting an email account, calendar, or file storage to an AI service gives that service ongoing access to the connected information under the provider's terms. Schools should have their technology administrator approve each connection and review its permissions before staff connect accounts.

Scheduled and automated tasks run without a person watching. Users should review every result and pause or remove any task that is no longer needed or no longer works as expected.

11. Not for emergencies

AI tools can miss, misread, or misjudge urgent messages. They must never replace the school's safety, emergency, incident-reporting, or mandatory-reporting procedures, and must not be relied on to detect situations that require immediate action.

12. Staff use only

The tools and setups in this guide are intended for adult school staff. They are not designed for students and should not be configured on student accounts. Each provider's age requirements and eligibility rules apply.

13. Downloadable files

Downloadable files, such as skill files and templates, are provided "as is." The school's technology administrator should review each file before it is installed and decide whether uploads and skills are allowed in the school's accounts.

14. Sample content

Schools, people, and events in examples and practice materials, including "Riverside Prep," are fictional and included only for demonstration. Any resemblance to actual persons or organizations is coincidental.

15. Complimentary assessment offer

The complimentary AI Readiness Assessment is offered without any obligation to purchase services. It is subject to availability and scheduling capacity, and IT for Education may change or end the offer at any time.

16. Independent review

Schools are encouraged to consult their administrators, technology leadership, privacy officers, and legal counsel before implementing AI systems involving institutional or personal data.

Need help? IT for Education · 305-403-7582 · itforedu.com. Screenshots taken Nov 2026 with personal titles blurred; the briefing example uses sample data. Your screen may look slightly different.