

8 Dimensions Assessments

Open each improvement roadmap for its progress-monitoring survey and action steps.

Dimension 1 — Leadership & Governance

Leadership and Governance Progress Monitoring Survey

Where are you? Questions to ask your leaders?

Leadership and Governance Progress Monitoring Survey

Directions: Please indicate the extent to which you agree with each statement.

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree
1. District leaders consistently communicate the district's vision, mission, and strategic priorities.	☐	☐	☐	☐
2. I understand how current district initiatives support the district's strategic goals.	☐	☐	☐	☐
3. District leaders communicate important decisions and updates in a timely manner.	☐	☐	☐	☐
4. District leaders provide opportunities for staff, families, and stakeholders to offer feedback and input.	☐	☐	☐	☐
5. Feedback from stakeholders is considered when making district decisions.	☐	☐	☐	☐
6. District leaders use data and evidence to guide decisions and improvement efforts.	☐	☐	☐	☐
7. The Board of Education and district administration demonstrate alignment and a shared commitment to district priorities.	☐	☐	☐	☐
8. District leaders model accountability by following through on commitments and communicating progress toward goals.	☐	☐	☐	☐
9. There is a high level of trust between district leadership and stakeholders.	☐	☐	☐	☐

10. Overall, leadership and governance practices are helping move the district toward its desired future.	☐	☐	☐	☐
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Why These 10 Questions?

They measure the five core drivers of effective Leadership and Governance:

Driver Questions

Vision and Strategic Direction 1, 2

Communication and Transparency 3, 8

Stakeholder Engagement 4, 5

Data-Informed Decision Making 6

Alignment, Trust, and Accountability 7, 9, 10

Recommended Administration

- ☐ Fall (Baseline): Establish current perceptions and identify priorities.
- ☐ Winter (Mid-Year Check): Measure implementation progress and adjust strategies.
- ☐ Spring (Year-End Review): Assess growth, celebrate successes, and identify next steps.

Suggested Success Target

A common target for district strategic monitoring is:

- ☐ 85% or more Agree/Strongly Agree on each item by year-end.
- ☐ No item below 75% favorable.
- ☐ Positive movement of 5–10 percentage points from Fall to Spring on priority items.

This creates a concise Leadership and Governance Scorecard that can be reported to the Board, leadership team, staff, and community as part of the district's strategic plan monitoring pro

What might you do to improve?

The actions below are organized into **First Steps (Foundation)**, **Next Steps (Implementation)**, and **Extended Steps (Sustainability & Excellence)** to help districts systematically strengthen Leadership & Governance.

First Steps (0–6 Months)	Next Steps (6–18 Months)	Extended Steps (18+ Months)
1. Clarify Governance Roles and Responsibilities – Define and	5. Establish a Leadership Accountability System –	8. Institutionalize Strategic Governance Practices – Embed

First Steps (0–6 Months)	Next Steps (6–18 Months)	Extended Steps (18+ Months)
communicate the distinct roles of the Board, Superintendent, Cabinet, Principals, and Leadership Teams.	Develop scorecards, performance measures, and regular progress reviews tied to strategic goals.	strategic reviews, governance protocols, and leadership expectations into district operations.
2. Reaffirm Mission, Vision, Values, and Strategic Priorities – Ensure leaders have a common understanding of the district’s direction and expectations.	6. Create Structured Stakeholder Engagement Processes – Establish advisory groups, listening sessions, surveys, and feedback loops to inform decisions.	9. Develop Leadership Succession and Capacity-Building Plans – Build future leadership pipelines and ensure continuity during transitions.
3. Conduct a Leadership and Governance Self-Assessment – Identify strengths, gaps, and opportunities for improvement using stakeholder feedback and governance standards.	7. Strengthen Data-Informed Decision-Making – Create leadership dashboards and protocols for using data, evidence, and stakeholder input to guide decisions.	10. Create a Culture of Shared Leadership and Continuous Improvement – Empower leaders at all levels to own strategic priorities, solve problems collaboratively, and innovate.
4. Develop a Comprehensive Communication Plan – Establish consistent communication regarding priorities, decisions, progress, and outcomes.		

What are ways we can help you?

What are ways we can help you?
1. Help leaders understand the knowledge, skills, tools and strategies to use strategic management to improve themselves and their school or district. 2. Explore visionary leadership. 3. Enhance relationships between board, management, and union. 4. Focus on governance structures to enhance collaboration and other decision-making skills and strategies: Programs, departments, grade levels, teams, PLCs 5. Assess your data management system: How do you measure success? What are your key indicators and measures? How accessible is this information? Is it used for decision-making?

What have others done to improve?

What have others done to improve?

- **Set up leadership structures, roles and responsibilities for strategic plan management, coordination, responsibility, and accountability: Goal Champions, Action Team Leaders and Members.**
- **Provide professional development for leaders throughout the system in knowledge, skills, and dispositions to be a strategic leader.**
- **Implement an annual summer Leadership Retreat focused on strategic plan progress, challenges and celebrations.**
- **Align strategic management practices to meeting protocols and agendas - BOE, Cabinet, Administrative, Union, School, Team.**
- **Transformational leaders build strong relationships with students, families and staff to foster trust, respect, commitment, cohesion, and unity.**

Dimension 2 — Performance Culture & Change Management

Performance Culture and Change Management Progress Monitoring Survey

Where are you? Questions to ask your leaders?

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree
1. District leaders clearly communicate the purpose and expected outcomes of improvement initiatives and changes.	☐	☐	☐	☐
2. Staff understand how current improvement efforts support the district's strategic priorities.	☐	☐	☐	☐
3. Staff are encouraged to share ideas, identify challenges, and contribute to solutions.	☐	☐	☐	☐
4. The district provides the training, resources, and support needed to successfully implement new initiatives.	☐	☐	☐	☐
5. Leaders actively address barriers and challenges that impact successful implementation.	☐	☐	☐	☐
6. Collaboration among staff and teams is improving our ability to achieve district goals.	☐	☐	☐	☐
7. The district encourages innovation and continuous improvement in teaching, learning, and operations.	☐	☐	☐	☐
8. Progress toward improvement goals is regularly monitored and communicated.	☐	☐	☐	☐
9. Successes and accomplishments are recognized and celebrated throughout the district.	☐	☐	☐	☐
10. Overall, the district is building a culture that embraces change, accountability, and continuous improvement.	☐	☐	☐	☐

Why These 10 Questions?

They measure the five core drivers of effective Leadership and Governance:

Driver Questions

Vision and Strategic Direction 1, 2

Communication and Transparency 3, 8

Stakeholder Engagement 4, 5

Data-Informed Decision Making 6

Alignment, Trust, and Accountability 7, 9, 10

Recommended Administration

- ☐ Fall (Baseline): Establish current perceptions and identify priorities.
- ☐ Winter (Mid-Year Check): Measure implementation progress and adjust strategies.
- ☐ Spring (Year-End Review): Assess growth, celebrate successes, and identify next steps.

Suggested Success Target

A common target for district strategic monitoring is:

- ☐ 85% or more Agree/Strongly Agree on each item by year-end.
- ☐ No item below 75% favorable.
- ☐ Positive movement of 5–10 percentage points from Fall to Spring on priority items.

This creates a concise Leadership and Governance Scorecard that can be reported to the Board, leadership team, staff, and community as part of the district's strategic plan monitoring process.

What might you do to improve?

The actions below are organized into **First Steps (Foundation)**, **Next Steps (Implementation)**, and **Extended Steps (Sustainability & Excellence)** to help districts systematically strengthen Leadership & Governance.

First Steps (0–6 Months)	Next Steps (6–18 Months)	Extended Steps (18+ Months)
1. Clarify Governance Roles and Responsibilities – Define and communicate the distinct roles of the Board, Superintendent, Cabinet, Principals, and Leadership Teams.	5. Establish a Leadership Accountability System – Develop scorecards, performance measures, and regular progress reviews tied to strategic goals.	8. Institutionalize Strategic Governance Practices – Embed strategic reviews, governance protocols, and leadership expectations into district operations.
2. Reaffirm Mission, Vision, Values, and Strategic Priorities – Ensure leaders have a common	6. Create Structured Stakeholder Engagement Processes – Establish advisory groups, listening sessions,	9. Develop Leadership Succession and Capacity-Building Plans – Build future

First Steps (0–6 Months)	Next Steps (6–18 Months)	Extended Steps (18+ Months)
understanding of the district's direction and expectations.	surveys, and feedback loops to inform decisions.	leadership pipelines and ensure continuity during transitions.
3. Conduct a Leadership and Governance Self-Assessment – Identify strengths, gaps, and opportunities for improvement using stakeholder feedback and governance standards.	7. Strengthen Data-Informed Decision-Making – Create leadership dashboards and protocols for using data, evidence, and stakeholder input to guide decisions.	10. Create a Culture of Shared Leadership and Continuous Improvement – Empower leaders at all levels to own strategic priorities, solve problems collaboratively, and innovate.
4. Develop a Comprehensive Communication Plan – Establish consistent communication regarding priorities, decisions, progress, and outcomes.		

What are ways we can help you?

1. Help you develop or update a Preferred Future Statement: Mission, motto, vision, core values and a graduate portrait.
2. Define core values. Develop ways to assess living your core values.
3. Define competencies in a graduate portrait and align to grade level curriculum.
4. Design stakeholder surveys to assess culture and climate.
5. Assess and report your satisfaction survey results.
6. Develop actions to improve areas rated below expectations in survey results. Include measures to monitor efforts to improve.
7. Conduct a PESTLE assessment: Political, Economic, Social, Technological, Legal, and Environmental trends and shifts impacting the future of the school or district.

What have others done to improve?

- **Set up leadership structures, roles and responsibilities for strategic plan management, coordination, responsibility, and accountability: Goal Champions, Action Team Leaders and Members.**
- **Provide professional development for leaders throughout the system in knowledge, skills, and dispositions to be a strategic leader.**
- **Implement an annual summer Leadership Retreat focused on strategic plan progress, challenges and celebrations.**
- **Align strategic management practices to meeting protocols and agendas - BOE, Cabinet, Administrative, Union, School, Team.**
- **Transformational leaders build strong relationships with students, families and staff to foster trust, respect, commitment, cohesion, and unity.**

Dimension 3 — Strategic Thinking & Planning

Strategic Thinking and Planning Progress Monitoring Survey

Where are you? Questions to ask your leaders?

Directions: Please indicate the extent to which you agree with each statement.

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree
1. District leaders regularly communicate the district's strategic priorities and long-term goals.	☐	☐	☐	☐
2. I understand how current district initiatives and decisions support the district's strategic plan.	☐	☐	☐	☐
3. The district uses data, stakeholder feedback, and evidence to guide planning and decision-making.	☐	☐	☐	☐
4. The district regularly reviews progress toward strategic goals and communicates results to stakeholders.	☐	☐	☐	☐
5. District leaders adjust strategies and actions based on performance data and changing needs.	☐	☐	☐	☐
6. The district actively seeks input from staff, families, students, and community members when planning for the future.	☐	☐	☐	☐
7. Resources, time, and funding are aligned to support the district's highest strategic priorities.	☐	☐	☐	☐
8. The district effectively balances short-term needs with long-term strategic goals.	☐	☐	☐	☐
9. District leaders proactively discuss future opportunities, challenges, and emerging trends that may impact the district.	☐	☐	☐	☐
10. Overall, the district demonstrates a clear, future-focused approach to planning and continuous improvement.	☐	☐	☐	☐

Recommended Administration

- ☐ Fall (Baseline): Establish current perceptions and identify priorities.
- ☐ Winter (Mid-Year Check): Measure implementation progress and adjust strategies.
- ☐ Spring (Year-End Review): Assess growth, celebrate successes, and identify next steps.

Suggested Success Target

A common target for district strategic monitoring is:

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- ☐ No item below 75% favorable.
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This creates a concise Strategic Thinking and Planning Scorecard that can be reported to the Board, leadership team, staff, and community as part of the district's strategic plan monitoring process.

What might you do to improve?

The actions below are organized into **First Steps (Foundation)**, **Next Steps (Implementation)**, and **Extended Steps (Sustainability & Excellence)** to help districts systematically strengthen Leadership & Governance.

Strategic Thinking & Planning: Improvement Roadmap to Success

Strategic thinking and planning enable districts to move beyond reacting to today's challenges and proactively prepare for tomorrow's opportunities. High-performing districts continuously analyze their environment, anticipate emerging trends, engage stakeholders, evaluate risks, and align resources to achieve long-term success.

First Steps (0–6 Months)	Next Steps (6–18 Months)	Extended Steps (18+ Months)
1. Conduct a Comprehensive Strategic Assessment – Gather stakeholder feedback, review performance data, analyze demographic and enrollment trends, conduct SWOT analyses, and identify emerging opportunities and risks.	5. Establish a Formal Strategic Planning Framework – Create a structured process for annual strategic reviews, environmental scanning, priority setting, and action planning.	8. Institutionalize Strategic Thinking Across the Organization – Develop leaders and teams at all levels who routinely think beyond immediate issues and focus on long-term impact.
2. Clarify and Reaffirm Mission, Vision, Values, and Long-Range Priorities – Ensure all planning efforts are grounded in a shared	6. Develop Future-Ready Scenario Planning Processes – Explore potential future trends, risks, and	9. Build Predictive and Strategic Intelligence Capabilities – Use forecasting, predictive analytics, demographic

First Steps (0–6 Months)	Next Steps (6–18 Months)	Extended Steps (18+ Months)
understanding of the district's purpose and desired future.	opportunities and develop contingency plans for changing conditions.	studies, and trend analysis to guide long-term decision-making.
3. Create a District Strategic Planning Team – Establish a representative team responsible for guiding planning, monitoring progress, and engaging stakeholders.	7. Align Budgets, Staffing, Facilities, Technology, and Programs to Strategic Priorities – Ensure resources support what matters most.	10. Create a Culture of Strategic Learning and Adaptation – Regularly evaluate assumptions, learn from results, refine strategies, and adjust priorities as conditions change.
4. Establish Baseline Metrics and Strategic Success Measures – Identify key performance indicators (KPIs) that will monitor progress toward long-range goals.		

What are ways we can help you?

1. Help you get ready for strategic planning.
2. Develop leaders who think systemically rather than operationally.
3. Help district leaders understand the forces shaping education over the next 5–10 years before making strategic decisions.
4. Assist you to back up to strategic thinking and action planning if your current strategic plan is stuck.
5. Help you refresh your current strategic plan.
6. Help you draft a strategic plan for board approval.
7. Help leadership identify the few issues that matter most. Focus on the highest-leverage challenges instead of trying to solve everything.
8. Leadership becomes proactive instead of reactive.

What have others done to improve?

- **Conducted readiness to prepare for strategic planning**
- **Encouraged and understood the importance of strategic thinking before planning**
- **Used a stakeholder driven process to develop a new strategic plan**
- **Understood the three important stages to strategic planning: getting ready, planning, and living and plan**
- **Refreshed their current strategic plan**
- **Refreshed a long range goal and aligned strategies**
- **Developed a list of forces shaping education over the next 5-10 years**
- **Defined clearly the skills required to think systematically rather than operationally**

Dimension 4 — Alignment & Operationalizing Strategy

Alignment and Operationalizing Strategy Progress Monitoring Survey

Where are you? Questions to ask your leaders?

Alignment and Operationalizing Strategy Progress Monitoring Survey

Directions: Please indicate the extent to which you agree with each statement.

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree
1. District leaders consistently communicate strategic priorities and expectations.	☐	☐	☐	☐
2. I understand how my work contributes to achieving the district's strategic goals and desired outcomes.	☐	☐	☐	☐
3. School, department, and district initiatives are aligned with the district's mission, vision, and strategic plan.	☐	☐	☐	☐
4. Resources, staffing, professional learning, and budgets support the district's highest strategic priorities.	☐	☐	☐	☐
5. District leaders regularly monitor implementation progress and communicate results.	☐	☐	☐	☐
6. Clear goals, responsibilities, and expectations are established for major district initiatives.	☐	☐	☐	☐
7. Barriers that hinder implementation are identified and addressed in a timely manner.	☐	☐	☐	☐
8. Collaboration across schools, departments, and teams supports successful implementation of district priorities.	☐	☐	☐	☐
9. The district holds itself accountable for achieving	☐	☐	☐	☐

strategic goals and desired outcomes.				
10. Overall, the district effectively translates its strategic plan into meaningful action and results.	☐	☐	☐	☐

Recommended Administration

- ☐ Fall (Baseline): Establish current perceptions and identify priorities.
- ☐ Winter (Mid-Year Check): Measure implementation progress and adjust strategies.
- ☐ Spring (Year-End Review): Assess growth, celebrate successes, and identify next steps.

Suggested Success Target

A common target for district strategic monitoring is:

- ☐ 85% or more Agree/Strongly Agree on each item by year-end.
- ☐ No item below 75% favorable.
- ☐ Positive movement of 5–10 percentage points from Fall to Spring on priority items.

This creates a concise Strategic Thinking and Planning Scorecard that can be reported to the Board, leadership team, staff, and community as part of the district's strategic plan monitoring process.

What might you do to improve?

The actions below are organized into **First Steps (Foundation)**, **Next Steps (Implementation)**, and **Extended Steps (Sustainability & Excellence)** to help districts systematically strengthen Leadership & Governance.

First Steps (0–6 Months)	Next Steps (6–18 Months)	Extended Steps (18+ Months)
1. Create a Strategic Alignment Framework – Develop a clear line of sight connecting the mission, vision, goals, strategies, action plans, and performance measures.	5. Align School, Department, and Team Plans – Require all improvement plans to explicitly connect to district strategic goals and success measures.	8. Institutionalize Strategy Management Processes – Embed strategy review and alignment into annual planning, budgeting, staffing, and operational cycles.
2. Clarify Strategic Priorities and Success Measures – Identify the few critical priorities that will drive district improvement and define measurable outcomes.	6. Develop Accountability and Progress Monitoring Systems – Establish dashboards, scorecards, implementation	9. Build Organizational Capacity for Strategic Execution – Train leaders and teams to manage projects, monitor performance,

First Steps (0–6 Months)	Next Steps (6–18 Months)	Extended Steps (18+ Months)
	reviews, and regular strategy meetings.	solve problems, and adjust implementation.
3. Communicate the Line of Sight – Help employees understand how their roles contribute to strategic goals and desired student outcomes.	7. Align Resources to Strategic Priorities – Create budget, staffing, technology, facility, and professional learning decisions that directly support strategic objectives.	10. Create a Culture of Strategic Ownership and Execution Excellence – Ensure every employee understands, monitors, and contributes to strategic success.
4. Inventory Current Initiatives and Eliminate Misalignment – Identify programs, projects, and activities that do not support strategic priorities and reallocate resources accordingly.		

What are ways we can help you?

1. Align resources to your strategic plan.
2. Align school improvement plans to the district strategic plan
3. Align program and department improvement plans to the district strategic plan
4. Develop the workforce needed to achieve your vision
5. Align goals, metrics and strategies to the mission, vision, values and graduate portrait
6. Conduct an alignment review of your current strategic plan to see how mission, vision, values and goals/strategies align and make recommendations for tightening and improving the current plan
7. Aligning classroom practice to reflect your strategic priorities
8. Leadership becomes proactive instead of reactive.

What have others done to improve?

- Created a strategic alignment study to better connect mission, vision, core values, the graduate portrait, long-range goals, indicators and metrics, and strategies for improvement.
- Connecting employee work to the focus and direction of the strategic plan.
- Addressing student, family and staff agency- ownership of learning and results, commitment to the plan, aligning progress to the plan.
- Understanding the four elements of execution.
- Conducting walk throughs/fidelity checks to ensure better consistency in implementation
- Aligning the budget process to annual strategic planning and school improvement planning
- Aligning core values to behaviors and actions
- Aligning the graduate portrait to curriculum at grade levels

Dimension 5 — Performance Reporting, Analyzing, & Informing

Performance Reporting, Analyzing, and Informing Progress Monitoring Survey

Directions: Please indicate the extent to which you agree with each statement.

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree
1. The district regularly shares timely and relevant data on progress toward strategic goals and priorities.	☐	☐	☐	☐
2. Performance data is presented in a clear and understandable manner that helps stakeholders understand results and trends.	☐	☐	☐	☐
3. District leaders and staff use data to identify strengths, challenges, and opportunities for improvement.	☐	☐	☐	☐
4. The district has clear performance measures that help monitor progress toward desired outcomes.	☐	☐	☐	☐
5. Data discussions focus on both results and the actions needed to improve performance.	☐	☐	☐	☐
6. The district regularly reviews progress and adjusts strategies based on evidence and results.	☐	☐	☐	☐
7. Stakeholders have access to information that helps them understand district performance and priorities.	☐	☐	☐	☐
8. Successes, accomplishments, and areas needing improvement are communicated openly and transparently.	☐	☐	☐	☐
9. Data is used to support accountability and informed decision-making at all levels of the organization.	☐	☐	☐	☐
10. Overall, the district effectively uses performance information to drive continuous improvement and better outcomes.	☐	☐	☐	☐

Key Drivers Measured

Driver	Questions
Reporting & Transparency	1, 7, 8
Data Accessibility & Understanding	2
Data-Informed Decision Making	3, 9
Performance Measurement	4
Action-Oriented Data Use	5, 6
Continuous Improvement Culture	10

Recommended Monitoring Schedule

Fall (Baseline)

- Assess understanding of performance measures and reporting systems.
- Identify gaps in data access, transparency, and use.

Winter (Mid-Year Review)

- Monitor progress toward strategic goals.
- Evaluate whether data is being used to adjust actions and improve implementation.

Spring (Year-End Reflection)

- Assess growth in data literacy, accountability, and continuous improvement practices.
- Identify improvements needed for the following year.

Suggested Success Targets

- **85% or more Agree/Strongly Agree** on each item.
- **90% favorable** on Questions 1, 2, 3, and 6 (reporting, understanding, data use, and strategic adjustment).
- Increase favorable responses by **5–10 percentage points** from Fall to Spring on priority items.
- No item below **75% favorable**.

These 10 questions create a **Performance Reporting, Analyzing, and Informing Scorecard** that helps district leaders determine whether data is moving beyond compliance and reporting to become a meaningful driver of decision-making, accountability, transparency, and continuous improvement.

What Might You Do to Improve?

First Steps (0–6 Months)	Next Steps (6–18 Months)	Extended Steps (18+ Months)
1. Identify What Matters Most — Determine the critical results and outcomes leaders need to understand and monitor.	5. Develop Leadership Scorecards and Dashboards — Create simple visual tools that allow leaders to quickly see progress, trends, and areas of concern.	8. Connect Results to Strategic Decisions — Routinely use performance evidence to guide priorities, resources, programs, staffing, and improvement efforts.
2. Identify Key Performance Indicators — Select a manageable set of measures directly connected to strategic priorities and desired outcomes.	6. Establish Regular Performance Reviews — Create a consistent cycle for leaders and teams to review results, analyze trends, and discuss implications.	9. Strengthen Performance Communication — Transparently communicate accomplishments, impacts, challenges, lessons learned, and next steps to stakeholders.
3. Establish Baselines and Targets — Determine where performance currently stands and establish clear expectations for future success.	7. Strengthen Data Analysis and Leadership Conversations — Move beyond reporting numbers to asking: <i>What happened? Why? What are we learning? What should we do next?</i>	10. Create a Culture of Evidence-Informed Continuous Improvement — Make analyzing results, learning from evidence, adjusting strategies, and improving performance part of how the organization works.
4. Establish a Performance Reporting Process — Determine what will be reported, by whom, to whom, how often, and in what format.		

The progression

First Steps — BUILD THE FOUNDATION

What matters, and how will we know?

Next Steps — TURN DATA INTO INSIGHT

What is the evidence telling us?

Extended Steps — USE EVIDENCE TO IMPROVE

What will we do differently because of what we learned?

What Are Ways We Can Help You?

1. **Identify the key performance indicators that matter most** to your strategic priorities and desired outcomes.
2. **Develop meaningful measures and targets** that clearly define what success looks like.

3. **Create leadership scorecards** that provide a concise picture of organizational performance.
4. **Design dashboards** that make progress, trends, accomplishments, and areas of concern easy to understand.
5. **Establish a regular performance-review process** for leadership teams, schools, departments, and the Board.
6. **Strengthen leadership data conversations** so teams move from *What happened?* to *Why did it happen? What are we learning? What should we do next?*
7. **Help distinguish accomplishments from impacts** so reporting focuses not only on what was done, but on the difference the work made.
8. **Develop an annual strategic progress report** that communicates accomplishments, impacts, challenges, lessons learned, and next steps.
9. **Align district, school, department, and program measures** so everyone is monitoring progress toward common priorities.
10. **Build leadership capacity to use evidence for decision-making and continuous improvement** rather than simply collecting and reporting data.

What Have Others Done to Improve?

- Identified a manageable set of **10–15 key indicators** to monitor organizational performance.
- Created **monthly leadership scorecards** connected directly to strategic priorities.
- Developed dashboards showing **baseline → target → current performance → trend**.
- Established regular **data-review conversations** with leadership teams and the Board.
- Began using both **leading and lagging indicators** to better understand performance.
- Shifted annual reports from lists of activities to **accomplishments → impacts → next steps**.
- Created common definitions for **indicators, measures, metrics, and targets**.
- Disaggregated results to better understand differences among student groups, schools, programs, and departments.
- Used performance results to determine what strategies should be **continued, adjusted, expanded, or discontinued**.
- Made performance reporting part of a continuous-improvement cycle: **Measure → Analyze → Learn → Act → Improve**.

Dimension 6 — Strategic Project & Portfolio Management

Strategic Project and Portfolio Management Progress Monitoring Survey

Directions: Please indicate the extent to which you agree with each statement.

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree
1. The district clearly communicates which initiatives and projects are the highest priorities.	☐	☐	☐	☐
2. The district effectively balances the number of initiatives underway to support successful implementation.	☐	☐	☐	☐
3. Major district initiatives have clearly defined goals, timelines, responsibilities, and success measures.	☐	☐	☐	☐
4. Staff understand their role in implementing district priorities and strategic initiatives.	☐	☐	☐	☐
5. District leaders regularly monitor and communicate the progress of strategic initiatives.	☐	☐	☐	☐
6. Resources, staffing, time, and funding are aligned to support the successful implementation of priority initiatives.	☐	☐	☐	☐
7. Potential risks, challenges, and implementation barriers are identified and addressed in a timely manner.	☐	☐	☐	☐
8. The district adjusts priorities and plans when data or changing conditions indicate a need for improvement.	☐	☐	☐	☐
9. Collaboration across departments, schools, and teams supports the successful implementation of district initiatives.	☐	☐	☐	☐
10. Overall, the district effectively manages its strategic initiatives and projects to achieve desired results.	☐	☐	☐	☐

Key Drivers Measured

Driver	Questions
Strategic Prioritization	1, 2
Project Planning & Role Clarity	3, 4
Monitoring & Reporting	5
Resource & Capacity Management	6
Risk Management & Problem Solving	7
Adaptability & Continuous Improvement	8
Collaboration & Coordination	9
Overall Portfolio Effectiveness	10

Recommended Monitoring Schedule

Fall (Baseline)

- Assess clarity of priorities, initiative overload, and implementation readiness.
- Identify resource and communication gaps.

Winter (Mid-Year Review)

- Evaluate implementation progress, monitoring systems, and risk management.
- Adjust priorities and supports as needed.

Spring (Year-End Reflection)

- Assess execution effectiveness and organizational capacity.
- Identify lessons learned and priorities for the next cycle.

Suggested Success Targets

- **85% or more Agree/Strongly Agree** on each item.
- **90% favorable** on Questions 1, 3, 4, and 5 (prioritization, role clarity, and monitoring).
- Increase favorable responses by **5–10 percentage points** from Fall to Spring on identified growth areas.
- No item below **75% favorable**.

These 10 questions create a **Strategic Project and Portfolio Management Scorecard** that helps district leaders determine whether strategic initiatives are being prioritized, resourced, monitored,

and implemented effectively, while avoiding initiative overload and maximizing organizational capacity for success.

What Might You Do to Improve?

First Steps (0–6 Months)	Next Steps (6–18 Months)	Extended Steps (18+ Months)
1. Inventory Current Projects and Initiatives — Identify the major projects, initiatives, and improvement efforts currently underway across the organization.	5. Establish Project Management Practices — Use common project plans, milestones, timelines, progress measures, and reporting expectations.	8. Establish Strategic Portfolio Management — Regularly review the entire portfolio of projects to ensure the organization is investing in the work that matters most.
2. Align Projects with Strategic Priorities — Determine how each project contributes to strategic goals and desired results.	6. Monitor Progress, Risks, and Results — Establish regular reviews to identify progress, barriers, risks, delays, and needed adjustments.	9. Evaluate Project Impact and ROI — Determine whether completed projects produced the intended results and whether the investment of time, people, and resources was worthwhile.
3. Prioritize the RIGHT Work — Establish criteria for determining which projects should be started, continued, accelerated, redesigned, or stopped.	7. Strengthen Project Leadership Capacity — Develop leaders' skills in project planning, execution, collaboration, problem-solving, and accountability.	10. Create a Culture of Strategic Focus and Execution — Build organizational discipline around selecting fewer high-impact priorities, executing them well, learning from results, and sustaining successful practices.
4. Clarify Project Ownership and Accountability — Assign project leaders, define responsibilities, establish expected outcomes, and clarify who is accountable for results.		

The progression

First Steps — CHOOSE THE RIGHT WORK

What should we be working on—and why?

Next Steps — EXECUTE THE WORK WELL

Are our projects being implemented successfully?

Extended Steps — MANAGE FOR IMPACT

Are we investing our capacity in the work producing the greatest value?

What Are Ways We Can Help You?

1. **Conduct an inventory of current projects and initiatives** to understand everything competing for organizational attention.
2. **Align projects and initiatives to strategic priorities** so the work directly supports the district's direction.
3. **Develop criteria for prioritizing projects** based on strategic importance, impact, urgency, resources, and organizational capacity.
4. **Help determine what to start, stop, continue, accelerate, or redesign** to reduce initiative overload.
5. **Develop project charters and action plans** that clearly define outcomes, responsibilities, timelines, milestones, resources, and measures.
6. **Clarify project ownership and accountability** so every major initiative has an identified leader responsible for moving the work forward.
7. **Create project scorecards and monitoring systems** to track milestones, risks, implementation, and results.
8. **Establish regular project and portfolio reviews** so leaders can identify barriers and make timely adjustments.
9. **Build project-management skills and leadership capacity** among administrators, project champions, and team leaders.
10. **Create a strategic portfolio-management process** that helps leaders continually determine whether they are investing their limited capacity in the RIGHT work.

What Have Others Done to Improve?

- Created an organization-wide **inventory of every major initiative and project** currently underway.
- Mapped each initiative to the **strategic priority or goal it supports**.
- Identified projects that were **duplicative, low impact, or no longer strategically important** and discontinued them.
- Developed criteria for deciding which initiatives should be **started, stopped, continued, accelerated, or redesigned**.
- Assigned a clear **project owner or champion** to every major strategic initiative.
- Created common **project charters, action plans, milestones, and reporting expectations**.

- Established regular **project status reviews** to identify progress, barriers, risks, and needed decisions.
- Created a **strategic project portfolio** so leadership could see all major initiatives in one place.
- Evaluated completed projects based on **impact and return on investment**, not simply whether activities were completed.
- Reduced the number of simultaneous initiatives so people had the **time, resources, and capacity to execute the highest-priority work well**.

Dimension 7 — Process Improvement

Process Improvement Progress Monitoring Survey

Directions: Please indicate the extent to which you agree with each statement.

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree
1. The district regularly reviews programs, services, and operational processes to identify opportunities for improvement.	☐	☐	☐	☐
2. Data, stakeholder feedback, and evidence are used to guide improvement efforts and decision-making.	☐	☐	☐	☐
3. Staff are encouraged and supported to identify inefficiencies and recommend solutions.	☐	☐	☐	☐
4. The district actively seeks input from students, families, staff, and community members to improve services and processes.	☐	☐	☐	☐
5. Improvement efforts focus on enhancing the experience and outcomes of students, families, and staff.	☐	☐	☐	☐
6. The district effectively uses technology and innovation to improve efficiency, communication, and service delivery.	☐	☐	☐	☐
7. District leaders remove barriers and support the implementation of process improvements.	☐	☐	☐	☐
8. Successful improvements are shared, replicated, and sustained across the district when appropriate.	☐	☐	☐	☐
9. Staff collaborate across departments, schools, and teams to solve problems and improve processes.	☐	☐	☐	☐
10. Overall, the district demonstrates a culture of continuous improvement focused on increasing effectiveness and achieving better outcomes.	☐	☐	☐	☐

Key Drivers Measured

Driver	Questions
Process Evaluation & Review	1
Data-Informed Improvement	2
Employee Empowerment	3
Stakeholder-Centered Improvement	4, 5
Innovation & Technology	6
Leadership Support	7
Sustainability of Improvements	8
Collaboration & Problem Solving	9
Continuous Improvement Culture	10

Recommended Monitoring Schedule

Fall (Baseline)

- Assess current improvement practices and culture.
- Identify barriers, inefficiencies, and opportunities.

Winter (Mid-Year Review)

- Evaluate implementation of improvement efforts.
- Monitor stakeholder feedback and staff engagement.

Spring (Year-End Reflection)

- Assess the effectiveness and sustainability of improvements.
- Identify priorities for the next improvement cycle.

Suggested Success Targets

- **85% or more Agree/Strongly Agree** on each item.
- **90% favorable** on Questions 2, 3, 4, and 10 (data use, staff empowerment, stakeholder input, and continuous improvement culture).
- Increase favorable responses by **5–10 percentage points** from Fall to Spring on priority areas.
- No item below **75% favorable**.

These 10 questions create a **Process Improvement Scorecard** that helps district leaders determine whether continuous improvement is becoming part of the district's culture and whether improvement efforts are leading to more effective processes, better services, and stronger outcomes for students, families, staff, and the community.

What Might You Do to Improve?

First Steps (0–6 Months)	Next Steps (6–18 Months)	Extended Steps (18+ Months)
1. Identify Critical Processes — Determine which organizational and instructional processes have the greatest impact on students, staff, families, and district performance.	5. Redesign and Improve Priority Processes — Simplify workflows, eliminate unnecessary steps, clarify responsibilities, and address identified barriers.	8. Expand Successful Improvements — Scale effective process improvements across schools, departments, and the organization.
2. Identify Processes That Need Improvement — Use data, stakeholder feedback, recurring problems, delays, and inefficiencies to determine where improvement is most needed.	6. Use a Consistent Improvement Method — Apply PDSA or another disciplined improvement process to test changes, learn from results, and make adjustments.	9. Build Organization-Wide Improvement Capacity — Develop leaders and teams who can independently identify problems, analyze processes, test solutions, and measure results.
3. Map How the Work Currently Gets Done — Document key steps, responsibilities, handoffs, decision points, and outcomes to understand the current process.	7. Measure the Impact of Improvements — Determine whether changes are producing greater efficiency, quality, consistency, stakeholder experience, and results.	10. Create a Culture of Continuous Improvement — Make questioning, learning, problem-solving, innovation, and improving processes simply <i>the way we work</i> .
4. Identify Root Causes and Improvement Opportunities — Look beyond symptoms to determine why problems occur and where changes could produce the greatest impact.		

The progression

First Steps — UNDERSTAND THE WORK

How does the work really get done, and where are the problems?

Next Steps — IMPROVE THE WORK

What can we change, test, and measure to get better results?

Extended Steps — BUILD THE CULTURE

How do we make continuous improvement part of everyone's work?

What Are Ways We Can Help You?

1. **Identify the processes that matter most** to student success, staff effectiveness, family experience, and organizational performance.
2. **Identify processes that need improvement** using data, stakeholder feedback, recurring problems, delays, inconsistencies, and inefficiencies.
3. **Map current processes** to understand how the work actually gets done from beginning to end.
4. **Identify root causes** rather than repeatedly addressing symptoms of recurring problems.
5. **Identify bottlenecks, unnecessary steps, duplication, and gaps** that make work more difficult or less effective.
6. **Redesign and simplify critical processes** to improve quality, consistency, efficiency, and results.
7. **Introduce practical continuous-improvement methods**, including PDSA cycles, to help teams test and refine improvements.
8. **Develop meaningful process measures** so teams can determine whether changes are actually producing better results.
9. **Build the capacity of improvement teams and leaders** to analyze problems, improve processes, and sustain successful changes.
10. **Create a culture of continuous improvement** in which people regularly ask how work can be done better.

What Have Others Done to Improve?

- Identified a small number of **high-impact processes** that most needed improvement.
- Created **process maps** to understand how work was actually being completed rather than how leaders assumed it was being completed.
- Used **root-cause analysis** to understand why recurring problems continued to occur.
- Eliminated unnecessary steps, duplication, delays, and handoffs.
- Standardized effective practices where inconsistency was affecting quality or results.
- Used **PDSA cycles** to test changes on a small scale before expanding them.
- Created improvement teams involving the **people who actually do the work**.
- Developed process measures to determine whether changes improved **time, quality, consistency, cost, experience, or outcomes**.

- Conducted walkthroughs and fidelity checks to determine whether improved processes were being implemented consistently.
- Expanded successful improvements across schools and departments and made continuous improvement part of everyday work.

Dimension 8 — Sustainability

Sustainability Progress Monitoring Survey

Directions: Please indicate the extent to which you agree with each statement.

Source note: Perry's delivered Dimension 8 source begins this Progress Monitoring Survey at item 6. Items 1–5 were not included in the delivered source and are not reproduced here.

Statement	Strongly Agree	Agree	Disagree	Strongly Disagree
6. Knowledge, effective practices, and lessons learned are shared across the district to support long-term success.	☐	☐	☐	☐
7. Strategic priorities remain a focus even when challenges, staffing changes, or competing demands arise.	☐	☐	☐	☐
8. Resources, staffing, and budget decisions support the long-term sustainability of district priorities.	☐	☐	☐	☐
9. The district demonstrates adaptability and resilience when responding to changing circumstances and emerging needs.	☐	☐	☐	☐
10. Overall, the district is building the leadership capacity, systems, and culture needed to sustain long-term success.	☐	☐	☐	☐

Key Drivers Measured

Driver	Questions
Sustainable Systems & Processes	1, 7
Shared Ownership & Accountability	2
Continuous Improvement Culture	3
Strategic Focus & Momentum	4
Leadership Development & Succession	5
Knowledge Transfer & Organizational Learning	6
Resource Sustainability	8

Driver	Questions
Adaptability & Resilience	9
Overall Sustainability Capacity	10

Recommended Monitoring Schedule

Fall (Baseline)

- Assess organizational readiness for sustaining strategic priorities.
- Identify gaps in leadership capacity, ownership, and systems.

Winter (Mid-Year Review)

- Monitor momentum, leadership development, and implementation sustainability.
- Adjust supports and succession planning efforts as needed.

Spring (Year-End Reflection)

- Assess whether sustainable practices have become embedded.
- Identify priorities for maintaining progress into the following year.

Suggested Success Targets

- **85% or more Agree/Strongly Agree** on each item.
- **90% favorable** on Questions 1, 2, 3, and 4 (systems, ownership, culture, and strategic focus).
- Increase favorable responses by **5–10 percentage points** from Fall to Spring on identified growth areas.
- No item below **75% favorable**.

These 10 questions create a **Sustainability Scorecard** that helps district leaders determine whether strategic improvement efforts are becoming institutionalized, leadership capacity is growing, and the organization is developing the resilience and systems necessary to sustain success regardless of changes in personnel, leadership, or external conditions.

What Might You Do to Improve?

First Steps (0–6 Months)	Next Steps (6–18 Months)	Extended Steps (18+ Months)
1. Identify What Must Be Sustained — Determine which strategic priorities, practices, programs, processes, and results are most important to preserve and strengthen.	5. Build Leadership Capacity at Every Level — Develop the knowledge, skills, ownership, and confidence needed for others to lead and sustain the work.	8. Institutionalize What Works — Embed successful practices into policies, procedures, budgets, job responsibilities, professional learning, and everyday operations.
2. Assess Sustainability Risks — Identify where progress depends too heavily on particular leaders, individuals, funding sources, programs, or temporary structures.	6. Develop Leadership Succession Plans — Identify future leaders, create leadership pipelines, and intentionally prepare people to assume greater responsibility.	9. Continuously Evaluate and Adapt — Regularly examine whether practices remain effective, relevant, affordable, and aligned with changing needs and conditions.
3. Identify the Practices Producing the Greatest Impact — Use evidence to determine what is working, what should continue, and what should be strengthened or discontinued.	7. Align Resources for Long-Term Success — Ensure budgets, staffing, time, professional learning, technology, and other resources support the practices the organization intends to sustain.	10. Create a Culture That Sustains Excellence — Build shared ownership, organizational learning, continuous improvement, and commitment so excellence survives changes in people and circumstances.
4. Document Essential Systems and Practices — Clearly define critical processes, expectations, responsibilities, measures, and lessons learned so success does not depend on institutional memory.		

The progression

First Steps — KNOW WHAT MUST LAST

What is worth sustaining, and where are we vulnerable?

Next Steps — BUILD THE CAPACITY TO SUSTAIN IT

Do we have the people, leadership, and resources to keep the work moving forward?

Extended Steps — MAKE IT PART OF THE ORGANIZATION

What Are Ways We Can Help You?

- 1. Identify what is most important to sustain** — Determine which strategic priorities, practices, programs, processes, and results must continue over time.
- 2. Conduct a sustainability assessment** — Identify strengths, vulnerabilities, and areas where success depends too heavily on particular people, funding, or temporary structures.

3. **Determine what is producing the greatest impact** — Use evidence to decide what should be sustained, strengthened, expanded, redesigned, or discontinued.
4. **Document critical systems and practices** — Capture essential processes, responsibilities, expectations, measures, and lessons learned so organizational knowledge is not lost.
5. **Build leadership capacity throughout the organization** — Develop people who have the knowledge, skills, confidence, and ownership to continue the work.
6. **Develop succession and leadership-transition plans** — Prepare future leaders and ensure continuity when key personnel change.
7. **Align resources for long-term success** — Connect budgets, staffing, professional learning, technology, and time to the priorities and practices that need to endure.
8. **Embed successful practices into organizational systems** — Move important work from individual initiatives into policies, procedures, job responsibilities, improvement plans, and everyday routines.
9. **Create systems for monitoring and adapting** — Regularly determine whether practices remain effective and make adjustments as needs and conditions change.
10. **Build a culture that sustains excellence** — Develop shared ownership so continuous improvement and strategic leadership become *the way we work*.

What Have Others Done to Improve?

- Identified the **critical practices and systems** they could not afford to lose during leadership transitions.
- Conducted sustainability reviews to identify work that was **too dependent on one person or champion**.
- Created **leadership pipelines** to identify and develop future leaders.
- Established formal **succession plans** for critical leadership positions.
- Documented important processes, protocols, responsibilities, and lessons learned.
- Embedded successful initiatives into **budgets, job descriptions, professional learning, policies, and operating procedures**.
- Aligned long-term financial planning with strategic priorities to ensure important work had the resources needed to continue.
- Developed distributed leadership structures so **ownership extended beyond the superintendent and cabinet**.

- Regularly evaluated programs and practices to determine what should be **sustained, improved, expanded, or discontinued**.
- Built continuous-improvement routines so the organization could **adapt without losing its strategic direction**.