STRATEGIC PLANNING
2016 NACSA LEADERSHIP CONFERENCE  |  OCTOBER 26, 2016

PRESENTERS

MARY BRADLEY
Executive Director, Chicago Public Schools Office of Innovation and Incubation  |  MBradley15@cps.edu

CINDY SCHUMACHER
Executive Director, The Governor John Engler Center for Charter Schools at Central Michigan University  |  CSchumacher@TheCenterForCharters.org
CMU AND THE CENTER’S STRATEGIC PLAN

HOW THEY RELATE

CMU’s Mission, Vision and Core Values

The Five Strategic Priorities
I. Student Success
II. Research and Creative Activity
III. Quality Faculty and Staff
IV. Community Partnerships
V. Infrastructure Stewardship

The Center’s Mission, Vision and Values

The Center’s Strategic Plan
Goals and Objectives

ORGANIZATIONAL PLANNING

Office/Unit Mission, Goals and Objectives

Unit Plan

Plan progress periodically assessed through PAM

Weekly reports to continuously monitor progress toward organizational and individual goals

EMPLOYEE PERFORMANCE

General Statement of Duties/Responsibilities (CMU)

Individual Goals, Projects, Initiatives (PMT)

Individual progress periodically monitored through PMT process

PAM helps inform individual reviews

Unit plans guide individual goals
MISSION, VISION, VALUES

MISSION:

VISION:

VALUES:

EXAMINING THE MISSION
MISSION: To transform public education through accountability, innovation and access to quality education for all students.

VISION: We envision a diverse and dynamic public education marketplace that fosters academic excellence for all children.

VALUES: Integrity | Respect | Compassion | Inclusiveness | Social Responsibility | Excellence | Innovation

ORGANIZATIONAL GOALS

PORTFOLIO MANAGEMENT
Provide access for all students to a quality education and ensure that the educational option being offered is of the highest quality.

STRATEGIC PARTNERSHIPS
Build relationships and establish partnerships that will create opportunities to further the Center’s mission, increase state and national visibility, and further authorizing and oversight best practices throughout the state and nation.

ACADEMIC SUPPORT
Provide expert academic support to increase overall academic performance of CMU-authorized schools.

WILDLY IMPORTANT GOALS (WIG)

1. Establish partnerships with five high quality operators by June 30, 2017 that will positively impact our portfolio’s performance.

2. Identify and agree upon a critical issue to educate, discuss with and advocate to state and national education stakeholders that positions the Center as a thought leader in public education and enhances our ability to impact public education.

3. Advance identified initiatives that stem from partnerships with the University and leverage CMU’s resources in a way that will promote and ensure value add to our schools while increasing CMU’s reputation as a leader in education.

WIG

1. Establish systems of measurement to formally track progress with Falcon Initiative schools to determine viability and long-term potential for continuation or expansion.

2. Utilizing research-based evidence in charter public school success, explore opportunities to provide support, technical assistance or facilitate the development of a school leadership learning platform.
COMMUNICATIONS
Develop and implement a communication and marketing strategy, incorporating the Center's branding proposal, that targets audiences and stakeholders while positioning the Center as the authority and resource on charter public schools, charter authorizing and quality public education choices.

WIG
1. Develop a plan to target stakeholders with key messages to position the Center as setting the standards for charter public school authorizing and charter public school innovation, education, choice and accountability.
2. Develop marketing/communications materials that target key audiences and stakeholders about the Center, specific programs, services and activities.
3. Utilizing the website, explore the short and long-term potential for designing and embedding a resource library that would provide access to key resources, possible module-simulated training pathways and resource referral to multiple audiences and stakeholders.

DATA
Develop critical data elements and analytical practices that provide for effective oversight, accountability and decision-making that yields improved organizational performance at the Center and fosters improved outcomes within CMU-authorized schools.

WIG
1. Design and implement a system of organizational evaluation that will allow for quantitative and qualitative measurement and monitoring of program and initiative effectiveness Center wide.
2. Using advanced statistical methodology and reporting, create and provide reporting templates and supplemental tools that will assist the Center and schools in understanding truly significant successes, disparities and trends in academic data.
3. Relying upon educational research and best practice resources, advance the understanding of trends in data analysis and data utility that will ensure the Center remains at the forefront of analytical practice.

LEADER DEVELOPMENT AND ORGANIZATIONAL CAPACITY
Recruit, retain and develop a team of diverse and passionate professionals who are committed to the mission of the Center.

WIG
1. Identify and implement ongoing opportunities for moving staff towards the categorization of Level 5 leadership.
2. Evolve targeted efforts in the areas of staff orientation, development, engagement and satisfaction.
ORGANIZATIONAL GOAL PLANNING MAP

TEMPLATE

MISSION:

VISION:

VALUES:

ORGANIZATIONAL GOALS

WILDLY IMPORTANT GOALS (WIG)

1.

2.

3.

CURRENT SITUATION

WIG

1.

2.

3.

CURRENT SITUATION

WIG

1.

2.

3.

CURRENT SITUATION

WIG

1.

2.

3.
ORGANIZATIONAL GOAL PLANNING MAP

CHICAGO PUBLIC SCHOOLS EXAMPLE

STRATEGIC PRIORITY 1: Execute a rigorous authorization process that leads to an improved portfolio of schools

What are the significant milestones (e.g. actions, deliverables) for deep implementation of our Strategic Priority? What are the measurements of Implementation & Impact?

### SIGNIFICANT MILESTONES: ACTIONS & DELIVERABLES

#### New Schools RFP
- Conduct rigorous reviews
- Approve new high quality schools to open
- Executive final agreements
- Plan and launch 2017 RFP

#### Restart Initiative
- Develop process
- Development and approval of policy
- Release RFP
- Identify and engage quality restart providers
- Engage with stakeholders
- Match providers with closing schools
- Execute final agreements

#### Renewal
- Launch renewal process
- Complete school evaluations including site visits and conduct comprehensive review/evaluation
- Renew high quality school operators
- Close low performing schools
- Execute final renewal agreements

#### Incubation
- Develop individualized plan for communication and engagement for schools opened within past 3 years
- Review of academic, financial, operational (compliance, staff turn-over, parent engagement/concerns, enrollment, STLS, EL, DL), Governance, CMO/EMO changes
- Quarterly check-ins and visits if needed

#### School closure
- Engage consultant in process revisions
- Identify student options
- Execute wind down agreement
- Complete wind down process

#### Strategy Alignment
- Clarification of high school and elementary district strategy
- Identification of areas in need of quality seats
- Aligned processes and communication

#### RESPONSIBILITY

- Elisa M. Botello
- Yesica Rufino-Perez
- Mary Bradley

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#### IF WE...
- Build an internal process consisting of internal and external content area experts that review each complete application to ensure that it meets CPS standards.
- Develop a charter re-start initiative.
- Deploy a rigorous renewal process and a comprehensive process for closing low performing schools.
- Align the charter school growth strategy with the district strategy.

#### THEN...
- We will increase the number of high quality options throughout the district.
- We will improve the options available while being least disruptive to students and families.
- We will ensure students are in quality schools that meet expectations.
- We will ensure decisions are made in the best interest of the district and its communities.

### INTERDEPENDENCIES

- Law Department
- CEO’s Office
- Communications
- Department of Facilities
- ODLSS
- Accountability
- Planning and Data Management
- Office of College and Career Success

- Law Dept. - Ruchi Verma, contribute to school closure process, review of all communications to impacted schools and parents.
- Law Dept. - Joanne Murphy, Review of any RFP and agreement template
- CEO’s Office - Hal Woods, Establish the district strategy
- Communications - Emily Bitner, review all external communications for school closure questions and press releases
- Facilities - Justin Starr, Assess viability of facilities plans for all schools in independent facilities.
- Mary DeRuntz
CHICAGO PUBLIC SCHOOLS EXAMPLE

ORGANIZATIONAL GOAL PLANNING MAP

Aligned processes and communication
Identification of areas in need of quality seats
Clarification of high school and elementary district strategy

Strategy Alignment

Complete wind down process
Execute wind down agreement
Identify student options
Engage consultant in process revisions
School closure

Quarterly check-ins and visits if needed
Review of academic, financial, operational (compliance, staff turnover, parent engagement/concerns, enrollment, STLS, EL, DL), Governance, CMO/EMO changes

Develop individualized plan for communication and engagement for schools opened within past 3 years

Incubation

Execute final renewal agreements
Renew high quality school operators
Complete school evaluations including site visits and conduct comprehensive review/evaluation
Launch renewal process

Renewal

Match providers with closing schools
Engage with stakeholders
Identify and engage quality restart providers
Development and approval of policy

Restart Initiative

Plan and launch 2017 RFP
Executive final agreements
Approve new high quality schools to open
Conduct rigorous reviews

New Schools RFP

What are the significant milestones (e.g. actions, deliverables) for deep implementation of our Strategic Priority? What are the measurements of Implementation & Impact?

STRATEGIC PRIORITY 1:

Execute a rigorous authorization process that leads to an improved portfolio of schools

SIGNIFICANT MILESTONES: ACTIONS & DELIVERABLES

□ Facilities, closures, new schools.
□ Media questions and press releases.
□ Communications to impacted schools and parents.
□ Identify 3 successful national operators that have an interest in Chicago for new schools.
□ 100% of schools in renewal will undergo a rigorous review.
□ The district strategy for both elementary and high school will be utilized when developing processes during the 2016-2017 school year.

LEAD PARTNERS

Accountability - Ryan Crosby, Calculate and provide annual SQRP ratings, two year averages and network averages
Planning and Data Management - Jimm Dispensa, provide demographic data for new school approvals, school renewals and amendments to school agreements
Office of College and Career Success - Molly Burke, assist with transition planning for students of closing schools
Access and Enrollment - Katy Ellis, assist with identifying school options for students of closing schools
Safety and Security - Jadine Chou, assess safety concerns for potential school closures and new schools

IMPLEMENTATION GOALS

□ 100% of complete applications will undergo a rigorous review process.
□ Identify 3 successful national operators that have an interest in Chicago for new schools.
□ Identify and engage with 3 successful restart operators outside of Chicago and 3 Chicago operators interested in becoming a restart operator.
□ Develop and implement plan for all schools that have opened within 3 years.
□ A restart process will be developed and implementation will begin spring 2017.
□ 100% of schools in renewal will undergo a rigorous review.
□ The district strategy for both elementary and high school will be utilized when developing processes during the 2016-2017 school year.

IMPACT GOALS

□ New schools approved in fall of 2016 will have an SQRP rating of 2+ or higher within 3 years of opening.
□ Schools that have opened within past 3 years demonstrate strong academic, financial and operational foundations.
□ Schools that undergo the restart process will have successful management and leadership transitions complete and in place by fall 2018 that results in improved academic performance throughout the two years of transition.
□ The overall performance of the I&I portfolio will demonstrate an improvement in the educational outcomes of students over the next three years.

MEANS OF COLLABORATION

□ Develop comprehensive project plans with specific timelines that are shared and communicated with team members
□ Establish a cross functional team (per authorization process) with clear lines of responsibility and accountability
□ Establish and meeting at regular check points throughout the process
□ Formally document progress using the project plan
□ Develop a high level dashboard to communicate relevant information to senior leadership

<table>
<thead>
<tr>
<th>TABLE LEAD</th>
<th>TARGET START DATE</th>
<th>TARGET END DATE</th>
<th>BASELINE</th>
<th>CHECK-IN</th>
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<th>FINAL STATUS</th>
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**ORGANIZATIONAL GOAL PLANNING MAP**

**TEMPLATE**

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**STRATEGIC PRIORITY 1:**
What are the significant milestones (e.g. actions, deliverables) for deep implementation of our Strategic Priority? What are the measurements of Implementation & Impact?

<table>
<thead>
<tr>
<th>SIGNIFICANT MILESTONES: ACTIONS &amp; DELIVERABLES</th>
<th>RESPONSIBLE LEAD</th>
<th>TARGET START DATE</th>
<th>TARGET END DATE</th>
<th>BASELINE</th>
<th>CHECK-IN</th>
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STRATEGIC PRIORITY 1: What are the significant milestones (e.g. actions, deliverables) for deep implementation of our Strategic Priority? What are the measurements of Implementation & Impact?
## TRACKING TOOL
### CHICAGO PUBLIC SCHOOLS EXAMPLE

<table>
<thead>
<tr>
<th>IMPLEMENTATION INDICATORS</th>
<th>INDICATORS (KPI)</th>
<th>TARGET</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Complete applications submitted will undergo a rigorous review process</td>
<td>100%</td>
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<tr>
<td></td>
<td># of successful Chicago and national operators identified and engaged</td>
<td>3 national operators (new schools)</td>
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<td>6 Restart (3 existing &amp; 3 new to Chicago)</td>
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<td>IMPACT INDICATORS</td>
<td>% of schools in renewal that undergo a rigorous process</td>
<td>100%</td>
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<td>% of new schools with SQRP ratings of Level 2+ or higher after 3 years</td>
<td>100%</td>
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<td>% of school closures who became “restart schools”</td>
<td>1-2</td>
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<td>% increase in academic performance of entire I&amp;I portfolio</td>
<td>Overall increase of 10% of level 2+ and higher schools</td>
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## TRACKING TOOL
### TEMPLATE

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### IMPACT INDICATORS

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## UNIT PLAN ASSESSMENT MATRIX (PAM) EXAMPLE

### CHARTER ACCOUNTABILITY PROGRESS REPORT

<table>
<thead>
<tr>
<th>Center Objective</th>
<th>PLAN Objective/Schedule of Deliverables</th>
<th>Completion Date</th>
<th>On-Time?</th>
<th>Unit Goal (Net Impact)</th>
<th>Metric (critical questions)</th>
<th>Overall Deliverable Actual Status</th>
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</thead>
<tbody>
<tr>
<td><strong>STANDARD OPERATING PROCEDURES</strong></td>
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<tr>
<td>6</td>
<td>1.1 Lead and Manage the School Operations Staff</td>
<td>30-Jun</td>
<td></td>
<td>Ensure that the School Operations Unit operates effectively to carry out the Unit PLAN through the implementation of sound business processes.</td>
<td>Does the School Operations team have the resources to perform high quality work that is valued and respected?</td>
<td>Through 1:1s and unit meetings continual reviews will assess whether the School Operations team has the resources it needs to perform high quality work that is valued and respected.</td>
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<tr>
<td>5</td>
<td>1.2 Develop and Maintain Charter Accountability Budget</td>
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<td>Funds will be utilized and Leadership budget.</td>
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<tr>
<td>5</td>
<td>1.3 Manage and Implement the associated Business Processes</td>
<td>30-Jun</td>
<td></td>
<td></td>
<td>Are business processes reviewed annually and updated, as necessary, in order to continually improve consistency and efficiencies within the unit?</td>
<td>At least 95% processes reviewed and updated in accordance with the Center’s established schedule.</td>
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<tr>
<td><strong>MANAGE THE CONTRACT DEVELOPMENT PROCESS</strong></td>
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<tr>
<td>3, 5</td>
<td>2.1 Develop and Execute the Annual Re/Authorization Cycle</td>
<td>30-Jun</td>
<td></td>
<td>Ensure the timely and accurate execution of the Charter Contract (and Amendments) that will guide the relationship between the Center and the schools.</td>
<td>Were the Contracts executed properly, timely and accurately?</td>
<td>Contracts for Class of 2016 (13) plus any new schools with a fall 2016 opening.</td>
</tr>
</tbody>
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### CENTER GOAL ALIGNMENT:
How do the goals in the plan align to the Center’s objectives? This is intended to focus each unit’s plans to the Center’s objectives.

### DISCIPLINED ACTION:
Where in the plan is the expected outcome of the disciplined action? This directs the reader to where to find more detail.

### COMPLETION DATE:
When is the expected outcome of the disciplined action? This aligns to dates established in the plan.

### ON-TIME?
Was the outcome completed in a timely manner?

### UNIT GOAL:
What are the overall goals of the plan (what is it trying to accomplish)? Generally, a plan’s goals are found in its executive summary. The goals show alignment of the plan’s goals to the Center’s objectives.
### Charter Accountability Progress Report

**Unit Plan Assessment Matrix (PAM) Example**

**Objective**

1. 3, 5
2. 5
3. 1.3 30-Jun
4. 1.2
5. 1.1 30-Jun

**Standard Operating Procedures**

- **Plan Objective/Schedule of Process**
  - Contract Amendment
  - Manage the Charter Cycle
  - Annual Re/Authorization
  - Develop and Execute the associated Business
  - Manage and Implement the Budget
  - Charter Accountability
  - Develop and Maintain Operations Staff
  - Lead and Manage the School Delivery

- **Deliverables**
  - Weekly reports; met monthly with team members for 1:1; attended ____ session(s) as a team; held quarterly reviews to assess overall progress toward the PLAN as well as the overall motivation of the team.
  - Budget amendments were necessary for <line item examples> due to....
  - ____ Business processes were updated in 2016 - including ____ Charter Accountability (___%) and ____ related to FP&A (___%).
  - ____ Charter Accountability business processes were not updated during 2016 due to ...; ____ FP&A business processes were not updated during 2016 due to ....
  - ____ Contracts were executed properly, timely and accurately.
  - All Charter Contracts were Board-approved prior to 06/30/20__ and were delivered to MDE within 10-days of being fully executed as required by statute; all standard Contract Amendments were fully executed and routed to MDE by xx/xx/2016; ____ Contract Amendments affecting site additions and/or grade additions were executed properly, timely and accurately and filed with MDE prior to 09/03/2016.

<table>
<thead>
<tr>
<th>MDE</th>
<th>Actual</th>
<th>Status</th>
<th>NOTES</th>
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<tbody>
<tr>
<td></td>
<td>As of 06/2016, ...</td>
<td>Weekly reports; met monthly with team members for 1:1; attended ____ session(s) as a team; held quarterly reviews to assess overall progress toward the PLAN as well as the overall motivation of the team.</td>
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<td></td>
<td>The year-end actual expenditures related to School Operations were within the final Leadership-approved budgeted levels.</td>
<td>Budget amendments were necessary for &lt;line item examples&gt; due to....</td>
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<tr>
<td></td>
<td>____ Business processes were updated in 2016 - including ____ Charter Accountability (<em><strong>%) and ____ related to FP&amp;A (</strong></em>%).</td>
<td>____ Charter Accountability business processes were not updated during 2016 due to ...; ____ FP&amp;A business processes were not updated during 2016 due to ....</td>
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**Overall Deliverable:**
- **METRIC:** What questions should be asked to determine whether progress is being made to the unit goal (net impact)? These questions can have either quantitative or qualitative answers.

**Actual and Status:** How much progress was made toward the goal? This section is informed by reviewing the established “metrics” and can be simply and graphically represented.

**Notes:** Are there any notes about the completion, schedule changes, observations or other elements that should be recorded? These can help inform leadership and also provide direction in plan revisions.

**Disciplined Action:**
- This item has been successfully completed, or is on track for successful completion by its expected time.

**Net Impact:**
- There has been positive movement toward this goal in the last period.

**Disciplined Action:**
- Moderate progress has been made on this item, or this item is in progress, but is not currently on track for completion by its expected time.

**Net Impact:**
- This goal has neither been advanced nor declined.

**Disciplined Action:**
- This item has not been successfully completed, or is not currently on track for successful completion.

**Net Impact:**
- There has been negative movement toward this goal in the last period.

**Disciplined Action:**
- This item has not begun. In other words, a blank means there is nothing to say on this item at this time.

**Net Impact:**
- A blank is not an option for Measurement of Changes. (Remember, our actions are only one of many things that affect progress toward these goals.)