



February 2025

ROI Process Guidebook

Table of Contents

Purpose of Document.....	2
What is the ROI Process (High Level).....	2
Objectives.....	2
How does this fit into Dallas ISD's other progress monitoring work?.....	2
Roles.....	4
Timeline.....	5
Identification of New Initiatives.....	6
Objectives.....	6
Criteria for Inclusion in the ROI Process.....	6
Roles for Each Initiative Contact.....	7
Places to Identify New Spend.....	8
Data Collection.....	9
Objectives.....	9
Overview of Steps/Timeline.....	9
Scheduling Interviews w/ Initiative Owners.....	9
Criteria for Year of ROI Data for Initiatives.....	11
Prepopulation Process.....	11
Displaying Multiple Years of Data on ROI Sheets.....	12
Initiative Interviews.....	16
Communicating Results.....	18
Objectives:.....	18
Overview of Steps/Timeline:.....	18
Artifacts Created to Communicate Results.....	18
Appendix: Data Deep Dive.....	19
List of Files.....	19
ROI Process Data Dictionary.....	21
List of Initiatives and Year of Data.....	25

Purpose of Document

To provide a comprehensive and actionable guide for effectively leading the ROI (Return on Investment) process within Dallas ISD.

What is the ROI Process (High Level)

The annual ROI process compiles data on the cost, reach, and impact of Dallas' initiatives targeting student outcomes to inform strategic resource use decisions in the budgeting process.

	Inputs	Outputs	Outcomes
	If every year, Dallas ISD...	...then, we expect...	...which will lead to...
Theory of Action	<ul style="list-style-type: none">Identifies all core activities driving significant (>\$300k) resource allocations in our budget;Collects data on inputs, outputs, and desired outcomes;And synthesizes that information for review as part of our annual budgeting process	<ul style="list-style-type: none">To be able to describe how the work that we are doing is driving student outcomesTo build trust with key stakeholdersTo shift resources away from lower-impact activities towards higher-impact work	<ul style="list-style-type: none">Improved overall resource use, leading to improved student outcomes
Measures	<ul style="list-style-type: none">Initiative list finalized by chiefs in early SeptInitiative interviews completed for each initiative by Oct 31stDashboard prepared for review by Nov	<ul style="list-style-type: none">Family perception survey resultsPrincipal net promoter scores\$'s reallocated each year towards work with demonstrated impact	<ul style="list-style-type: none">Progress on district outcome goals and constraint measures

Objectives

The ROI process...

- *Improves Communication*: The Board of Trustees expects us to:
 - connect budget to strategy
 - provide rationale for changes to spending
 - conduct this work under CPM 3.2
 - Evaluate the effectiveness and impact of district initiatives.
- *Improves Evaluation and Decision-Making*: The superintendent and CFO expect us to:
 - reflect on what to stop, continue, or scale
 - ensure that resources are aligned with the district's student outcome goals and/or constraints.
 - identify more sustainable approaches to implement the same strategy
- *Supports Complex Change*: We hope this process can enable:
 - strategic adjustments to improve outcomes
 - root cause investigations of why current strategy might not be resulting in desired outcomes and experiences
 - transparency and accountability in resource allocation.

How does this fit into Dallas ISD's other progress monitoring work?

The ROI process complements Dallas' other progress monitoring initiatives to hone strategy toward both meeting constraints / student outcome goals and actualizing Dallas' vision to be a premier urban school district.

Program Evaluation

The Evaluation and Assessment department evaluates the design, implementation, and ultimately the impact of key programs in Dallas ISD **at significant milestones** or intervals in a program's lifecycle. Taking a tailored, rigorous, and deep approach, the program evaluation team analyzes academic performance data, survey data, and employs other research-backed methods to deeply evaluate the work that Dallas is doing and provide recommendations for improvement.

ROI Process

The ROI process collects key metrics **annually** to provide a summary of the impact of Dallas' programmatic and instructional initiatives targeted at improving student outcome goals. The return on investment process provides district leadership and the public transparency into the success and reach of these investments. The ROI process often reports data that was collected as a part of the program evaluation process.

Office of School Improvement

The Office of School Improvement supports key initiatives to accelerate progress on. This team provides support to key initiatives to drive educational excellence and close gaps in Dallas ISD. This process includes goal setting, support for community outreach, and progress monitoring to support the continuous improvement of initiatives over the course of the school year.

Strategic Scheduling – Campus Based Investments

Dallas ISD monitors the return of investment of baseline campus-based services through strategic scheduling work. By ensuring that our best teachers are reaching the students with the most need and have the support (e.g. sufficient planning time with their peers, mentor teachers) to do that well, we are maximizing the ROI of our investments in time & attention schools.

Core Operational Costs

Dallas monitors core operational costs (Includes Food Services, Transportation, Utilities, Security, Maintenance, & Governance) for excellence & efficiency so that we can maximize service quality and dollars available to drive student outcomes. This monitoring includes the RFP/contracts process/rubrics, the Small Business office, and metrics presented on internal dashboards.

Roles

The ROI process is pulled off by a cross-functional team involving members of cabinet, finance, and the evaluation and assessment teams.

Table 1: ROI Process Administration Roles + Responsibilities

Department	Role	Does...
Board	Board of Trustees	Assess alignment between budget + ROI Data
Cabinet	Superintendent	Stewards teams through the ROI process Presents findings from the process to the board
	Deputy Superintendent of Staff + Accountability	
	CFO	
Finance	Executive Director of Budget	Oversees finance inputs to the ROI process – will refine roles for her team once work gets underway
	Budget Analysts	Likely includes compiling budget/cost information for initiatives under departments they're responsible for.
	Executive Director of Procurement	Provides procurement information as needed as an input in the ROI process.
Chief of Staff	Deputy Chief of Staff	Overall project manager
Evaluation and Assessment	Assistant Superintendent of Evaluation and Assessment	Ensures the ROI process aligns with district / team goals and addresses high-level challenges. Sets cadence for program evaluations.
	Executive Director of Program Evaluation	Oversees efforts of program evaluation analysts in ROI process filling in inputs, etc. Manages logistics to collect ROI data.
	Program Evaluation Managers	Provide support to program evaluation analysts in completing the ROI sheets for the projects they support.
	Program Evaluation Analysts	Serve as subject matter expert for initiatives they wrote the full evaluation for and initiatives in similar fields. Prepopulate ROI sheets for these initiatives with available data.

Timeline

Phase I: Initiative Identification (June – September)

- Develop list of initiatives to include based on prior years and review of upcoming year's budget
- Cabinet reviews and approves list of initiatives
- Ongoing revisions/updates based on additional context

List of initiatives created collaboratively based on...

- **E+A:** Program evaluation planning
- **Finance:** Major investments identified in budget/expenditure data
- **Cabinet:** Bright Spots or areas for deeper exploration

Phase II: Data Collection (September – January)

Iterative process to collect and compile data for each initiative through

- **Pre-population** using program evals, budget/position control data, & other data/reports
- **Interviews** with individual initiative owners
- **Follow-ups** to confirm finalized initiative sheet and to resolve any loose ends that popped up during the interviews.

E+A leads iterative process to collect and compile data for each initiative, collaborating with Finance team for cost and FTE information

Phase III: Communicating Results (November – May)

Results are communicated through dashboard + ROI handouts pulling data from multiple initiatives into a single view, grouped by strategy. These materials are leveraged by...

- Leadership reviewing dashboard and engaging in conversation with Chiefs in support of FY26 budget development process
- Board of Trustees during spring budget workshop and budget approval

Identification of New Initiatives

Objectives

Identify district initiatives that are directly supporting Dallas ISD's student outcome goals, their enabling condition, and their associated scope/reach and stakeholders.

Criteria for Inclusion in the ROI Process

The below table details the current criteria for an initiative's inclusion in the ROI process.

Table 2: Criteria for Inclusion in the ROI Process

Criteria	Elaboration	Why this Criteria is Established	Tactically, what this means	Exceptions
Connect-ion to Student Out-comes	The initiative maps to a strategy to actualize Dallas ISD's student outcome goals (and their enabling conditions)	These areas of spend are where the district holds the greatest flexibility, as core operational costs provide the foundation for which we can employ these strategies. Ensures that the process tracks actions / strategies that the district is taking rather than departments.	The ROI process excludes core operational costs that are not targeted strategies to improve student outcomes (e.g., principals, nurses, custodians). The initiative's name and framing reflects the strategy being implemented rather than the associated department.	Initiatives that are neither a core operational cost nor aligned with student outcome goals, should be evaluated (potentially in the ROI process) to justify its cost.
Depth	There is significant people, time, and money dedicated to the initiative.	Holding this threshold allows us to focus on initiatives with a sizable impact on resource use.	Spend of at least \$300K on this initiative. If the initiative is smaller, it likely can be lumped with similar investments.	N/A
Bright Spots	Work that the district wants to celebrate as essential in advancing student outcome goals and strategic priorities	This criterion makes sure that we provide space for initiative owners / chiefs / stakeholders to name any initiatives that they want to celebrate / make sure to include in the ROI process.	Bright spots can be suggested by... Initiative owners Cabinet Communications collateral (e.g., The Hub articles)	Initiatives that are not bright spots could be identified for inclusion in the ROI process.
New Spend	Work that is new or was expanded.	See section 'Places to Identify New Spend'		

Roles for Each Initiative Contact

For each initiative, it is important that the following personnel is identified:

Table 3: Roles for each Initiative Contact

Role	Filled By...	Identified By...	Responsible for...	Example (Dual Language)
Initiative Owner	The person oversees the work associated with this strategy. Typically, someone at the Director, Executive Director, Assistant Superintendent, or Deputy Chief level.	E+A Identifies & Cabinet Approves	Providing data and voiceover on their initiative's strategy, reach, and impact	<i>Executive Director of BILINGUAL ESL</i>
Associated Chief	The chief who oversees the initiative and the initiative owner	E+A Identifies & Cabinet Approves	Coach the initiative owner as they fill out the ROI sheet. They typically do not attend the interview.	<i>Deputy Superintendent of Staff and Accountability</i>
E+A Analyst	Member of the evaluation and assessment team that has written the program evaluation of this initiative (or the initiatives closest to it).	Executive Director of Program Evaluation	Pull data from program evaluation and other sources (e.g. demographic data) on initiative's reach and impact Prepopulate data before interview with initiative owner	<i>Analyst responsible for DL/ESL Program Evaluation</i>
Finance	Budget analyst responsible for the initiative	Executive Director of Finance	Provide and/or validate cost/FTE data	Analyst responsible for budget section
Other Meeting Attendees	These are other staff members who join the ROI initiative interview to provide additional context/voiceover to the work and data for their initiative.	Initiative Owner (+ Associated Chief) is responsible for adding others to the invite as applicable.	Adding context and data during the interview as requested by the initiative owner	<i>Director of Bilingual ESL</i>

Places to Identify New Spend

Each year, the finance and E+A teams should identify new areas of spend that are eligible for the ROI process. By identifying areas of new spend, we ensure that the ROI process captures all the ways that Dallas ISD is adjusting strategies in response to evolving data, research and student needs. After identifying the new areas of spend, use the [“Criteria for Inclusion in the ROI Process”](#) section to determine if the new spend is eligible for the ROI process.

Adjustments to spending patterns can be found in:

Table 4: Places to Identify New Spend

Source	This source is...	What to Look for	Example
Budget Requests + Files	A budget or expenditure file that includes the total sum of dollars associated with each account code.	Requests for new areas of spend (e.g., stipends, instructional materials / supplies, etc.) Changes warranting new methods to mark account codes (e.g. new ORG code, new subobject code, etc.)	PTECH initiative is captured in the finance file with subobject code “EC” at PTECH campuses.
HR / Position Control File	A file that lists the position code, job code, org code, compensation, and FTE of staff in the district.	New positions that are not on the operational side of the house	Literacy Acceleration Specialists are clearly marked with job code 6774 in the HR file.
Vendor / BoardDoc List + BoardDoc Analysis Reports	A list of BoardDocs approved by the board + their associated analysis files.	New non-operational contracts that are not providing baseline services.	Instructional Software and Digital Tools are marked by the sum of all spend on contracts for these services.

Note: A lot of this work likely involves developing hypotheses about the strategies that teams are implementing using these dollars that will be validated during the data collection phase.

Data Collection

Objectives

1. Identify the most impactful metrics for each initiative to inform decision-making aligned to the evaluation criteria.
2. Collect data that is accurate to the mission, reach, and impact of the initiative.

Overview of Steps/Timeline

Iterative process to collect and compile data for each initiative through three steps:

- ☐ Pre-population using program evaluations, budget/position control data, & other data/reports (e.g., school board presentations, Dallas ISD presentations, district-level data where applicable).
- ☐ Interviews with individual initiative owners to collect/confirm data
- ☐ Follow-ups with initiative owners & teams to collect outstanding data & receive final signoff.

Scheduling Interviews w/ Initiative Owners

ROI Process Announcement

After Chiefs confirm the list of initiative owners / initiatives, the project manager notifies chiefs and initiative owners via email that ROI meetings will be scheduled in the coming weeks and for teams to prepare data. This email includes all initiative owners, associated chiefs, and their admins.

Scheduling Interviews

The next step after this is to schedule interviews with the initiative owners. For ease on both ends, we did interviews for all initiatives under an initiative owner together. This process has typically occurs over a month and a half or so and is a lot of logistics. Steps included:

Grouping Initiatives

We also grouped initiatives so that those that we had access to less data on/that we had more open questions were scheduled earlier. For those that had pending program evaluations or that had a lot of data to sift through, we placed those in the later weeks. See [‘week of’](#) column in the database for more details on how ERS sorted initiatives in SY24-25.

To determine the length of the meetings we followed the below rules:

Table 5: Initiative Interview Length

# of Total Initiatives*	Amount of Time
1-2	30 Minutes
3	45 Minutes
4-5	60 Minutes
6-7	75 Minutes
8+	90 Minutes

**- For new initiatives/owners, it may be helpful to add 15 minutes to the suggested by the table above*

Booking Scheduling

We offered times on an online booking service (e.g. Calendly) to initiative owners.

Criteria for Year of ROI Data for Initiatives

The set of data that gets communicated on the dashboard is indicated within the individual google sheets in a dropdown and decided on by the E+A team based on the following criteria:

Table 7: Criteria for Year of ROI Data

Criteria	Question	Example
Completeness	What year of data will provide the most complete set of cost and student information? Can we identify the students served at this point in the year?	Reset Centers' number of students served evolves over the course of the year. Thus, we use previous year metrics for all fields given this fact.
Representative-ness	What year of data is most representative of the current strategy/investment?	Student Engagement Coordinators' caseloads dramatically increased between SY23-24 and SY24-25. Thus, we used data from SY24-25 although the caseloads for staff were not finalized.
Accessibility	What data is accessible to be leveraged in the ROI process?	Two-Way Dual Language Classrooms only had data available on the number of students / staff served for SY23-24.

A full list of initiatives and whether they use current-year or previous year data is included in the appendix, as well as the database.

Prepopulation Process

Before interviews are conducted, a prepopulation process is performed which ensures:

1. The initiative owner is not required to collect data that is already accessible to the Evaluation and Assessment / Finance team.
 - a. This eliminates a common step in the process, as often these departments would be pinged for relevant data anyway.
2. The initiative interview targets the fields/data where the ROI team has the least insight / most questions.

Displaying Multiple Years of Data on ROI Sheets

A key part of the Return on Investment process is making sure that initiatives are making progress toward their expected outcomes over time. Thus, by replicating the ROI process on an annual basis, we have a growing bank of data to both assess progress and level of investment over time. To this end, individual ROI sheets display Initiatives at a Glance data across multiple years in individual ROI sheets to enable deeper understanding of each initiatives' evolution on each sheet.

How does data across multiple years get shown on the ROI sheets?

Starting in SY25-26, the current-year initiative sheets for the ROI process display all available Initiatives-at-a-Glance data (current year, previous year, and all other years the initiative is included in the ROI process). This shift from displaying only the most recent complete dataset provides a more comprehensive view of initiative impact.

How data across years is shown across multiple years/ROI processes is section dependent. The below table goes over how this is displayed:

Table 8: How YoY Changes are Shown ROI Google Sheets

Section of ROI Google Sheet	YoY Changes are Shown in
Purpose, Outputs, and Outcomes	These metrics should not change significantly year over year.
Initiatives at a Glance Data	Creating columns for each year of data
Inputs and Leading Indicators	Embedding change over time in the narrative that teams provide inherently and captured in paragraph form. Previous years' inputs and leading indicators are included in other tabs of the Google Sheet link.

File Sources

To prepopulate the ROI spreadsheet, the following sources are leveraged to collect the most up-to-date complete set of data available:

Table 9: Prepopulation Process Data Sources

Type	Source	What is this Source	Includes Information on...	Example
Parallel Progress Monitoring Efforts	Program Evaluations	Reports, dashboards, and one-pagers created by E+A detailing results of the data analyses of Dallas ISD programs.	All ROI metrics.	The Reset Centers program evaluation outlines the cost, staff, and students serve, and strategy of this initiative.
	Office of School Improvement	Tool used by initiatives targeting to track progress toward goals to improve excellence + remove gaps.	Depends on initiative, but often inputs/outputs and number of students served.	The Resource Centers' Office of School Improvement work mentions its goals and strategies to increase the number of AA/EB students attending events.
Publicly Available Data	Program Website	Public website with details on the initiative.	Typically description + intended outcomes.	The GRAAD website names the programs/strategies that they employ to improve graduation rates.
	Communications Collateral	Pieces of media presented to the public about work going on in Dallas ISD in news outlets.	Local press coverage frequently highlights the impact of the district's initiatives.	For Career Institutes , this profile provides context on various pathways the districts offers and voiceover on how the district is advancing this strategy.
	Org Chart	Online flowchart detailing employee names, reporting structures, org codes, and position titles.	How staff are organized illustrates who is included in the work to advance an initiative (incl. initiative owners).	For Special Education: Engagement and Outreach , staff supporting it were clearly organized under Michelle Brown, the Director I.Sped Pro Dev/Engagement & Outreach.
Finance / HR Data	Finance File	A budget or expenditure file that includes the total sum of dollars associated with each account code.	Cost information How certain expenses are labeled (e.g. subobject/program codes) or which expenses	PTECH initiative is captured in the finance file with subobject code "EC" at PTECH campuses.
	Payroll / Position Control / HR File	A file that lists the position code, job code, org code, and FTE, and total compensation of staff.	Cost + FTE	Literacy Acceleration Specialists are clearly marked with job code 6774 in the HR file.

Documentation of these data sources

When collecting data throughout the pre-population and interview process, document data sources precisely for all quantitative data in the ‘Sources + Notes’ column of the initiative document. The objectives of this documentation are to facilitate...

1. **Triangulating among stakeholders** --- Documenting the fields below allows a clear path for stakeholders to validate that number/figure out where it came from.
 - a. This is especially helpful when the source is “initiative owner,” as oftentimes the numbers they provide could omit personnel costs or other associated expenses that deputy chiefs and chiefs have access to.
2. **Replicating Methodology in Future Years** --- ensures that we are capturing the same initiative each year and quickens future data collection process.

Table 10: Data Source Documentation

Characteristic	Example (Special Education - Campus Supports)
Year	SY23-24
Budget / Expenditure	Expenditure
Fund Source	General Operating
Document Name/File	Payroll File
Who Document Came From	N/A
What was included from the document	All compensation for staff with the following job titles in ORG's 880 (EHA Title VIB) and 942 (Special Ed): 2020.MANAGER II.CAMPUS SUPPORT.ADMN 2704.FACILITATOR.CAMPUS.INSS 2720.COORDINATOR II.CAMPUS SUPPORT.ADMN 6775.INSTRUCTIONAL SPECIALIST.N/A.INSS
Links	Link for the program evaluation

Send Prepopulated ROI Documents

After booking time with the initiative owner and completing the prepopulation process, the next step is to send out an email to the initiative owner a week in advance detailing the prepopulation process results and naming what lingering questions are remaining. Agendas generally take the below format, but should be tailored to the objectives stated in the “Initiative Interviews” section below. A template and example emails can be found in a separate foldef, as well.

Template/Sample Agenda for New initiatives

- **Share brief overview of the ROI process:**
 - Objectives: Helping Dallas ISD provide transparency and clarity into key strategic initiatives
 - ERS & E&A Roles: Supporting our data collection and documentation
- **Align on ultimate purpose and outcomes**

- We are covering these **four** initiatives as a part of the district's ROI process this year to spotlight Dallas' work to promote **safe and innovative facilities and engage families and communities.**
- **Determine ROI measures**
 - **NEW INITIATIVES ONLY**
 - We would love to spend some time with you on expected outputs and relevant outcome measures for this work – how do you think about measuring success of each of these programs?
 - We are also collecting standard metrics such as budget, # FTE, # of students served, etc. We're prepopulated some of this data already from our data from Evaluation and Assessment, and have left some in-line comments/questions for you in **red**.
 - **RETURNING INITIATIVES ONLY**
 - We would love to spend some time with you on expected outputs and relevant outcome measures for this work, which we largely took from the metrics we defined last year – do these still resonate?
 - We are also collecting standard metrics such as budget, # FTE, # of students served, etc. We received some of this data from your office last year, such as # of staff. We're prepopulated some of this data already from our data from Evaluation and Assessment, and have left some in-line comments/questions for you in **red**. N/A
- **Closeout & next steps**
 - Process for finalizing data on the sheet -- we will clean up the notes from the call (and any other follow-ups or reference materials shared) and share a revised version back with you for one final review.

Initiative Interviews

Objectives

The conversation should be facilitated toward the following objectives:

- Refine the strategy's definition, expected outputs, and methodology to accurately capture the reach of the initiative.
- Document adjustments in strategy since last evaluation cycle.
- Confirm pre-populated data.
- Collect and validate data provided by initiative owners.
- Determine outstanding data and develop a strategy for its collection.
- **RETURNING INITIATIVES ONLY:** Ensure data standardization across years and determine adjustments if discrepancies are identified. (see table below for guidance)

Ensuring Consistency across years in data collection

To assess consistency between years for ROI metrics (allowing cross-year comparisons), follow the guidance in the below table:

Table 11: Multiyear Initiative Interview Answer Implications

Metric Type	Questions for Initiative Owners	Implications of Questions
Purpose, Outputs, and Outcomes	Does this description we got from you last year still resonate?	If the description does not resonate, check that the new description aligns with the bounds of the initiative articulated in the Initiatives at a Glance metric section.
Initiatives at a Glance Data	<p>For your information, we have prepopulated many of the ROI metrics leveraging the methods described in the source column.</p> <p>What data do you have with respect to the remaining metrics?</p>	<p>If an initiative's definition or cost structure has changed from previous years, either...</p> <ul style="list-style-type: none">• Prior years' data should be adjusted to ensure comparability and maintain an apples-to-apples analysis.• Footnotes must clearly indicate the discrepancies, with a detailed explanation of source differences in the "Sources and Notes" column.
Inputs and Leading Indicators	<p>Do you have any refreshed numbers for these metrics we collected last year?</p> <p>Do you and your team collect any other data on inputs and impact? For example, XYZ</p>	When relevant, reflect metrics' changes over time in the narrative for inputs/leading indicators.

Common Q's about the ROI Process from Interviews

Table 12: Common Questions from Interview Owners

Question	Answer
What year of data does the ROI process cover? What year of data are you asking for?	The ROI process leverages the most recent year of data for which all initiative at a glance metrics are available. For example, for a program like reset centers, we would look at the previous year since we do not know which students were served during the current year, as the year is still progressing. And for a program like Communications, which serves all students, since we have sufficient cost and student information, we use current year data.
Which funds are included/excluded from the ROI process?	All operating dollars are eligible for the return on investment process, including general operating, title funding, grants, etc. Note the funding source and amounts from different sources if there are multiple.
Why does your cost number look so different from my budget number? Does the ROI process include personnel costs?	Yes, the ROI process captures all costs associated with the initiative, including personnel (e.g. initiative owner, their supervisees).
I don't have/collect that data and I don't know how it could be collected. What should I do?	<p>We can develop a strategy during this time to get to some data that can serve as a fair approximation:</p> <ul style="list-style-type: none"> - Determine if this data can be extrapolated from sources unavailable during the meeting / not previously considered (e.g., the department's data analyst, finance / IT / E+A data). - Determine if there is a suitable approximation for the metric. For example, when calculating the number of students, if you know the number of teachers impacted, you can assume an average class size for those teachers. Another example is looking at all the students in campuses that are impacted by an initiative if you do not know which specific students at those campuses are treated.

Follow-Ups

After the conversation ends, members of the finance and E+A team reflect changes discussed onto the sheets, while following up with initiative owners and teams to collect outstanding data.

Once all data is collected, the ROI team conducts a final check-through of new content and data before sharing with the initiative owner (with the associated chief cc'd) for the final sign-off. This final email serves as a helpful check and bring the owner (and the associated chief) into the final output.

Communicating Results

Objectives:

Present ROI findings clearly and effectively to stakeholders, enabling data-driven and strategic decision making on both district strategy and goals.

Overview of Steps/Timeline:

- Develop dashboard to pull data from multiple initiatives into single view, grouped by strategy
- Leadership reviews dashboard and engages in support of FY26 budget development process
- Create streamlined view to share with Board of Trustees during Spring Budget Workshops

Artifacts Created to Communicate Results

At the conclusion of the ROI process, the following artifacts are made to report the results of the ROI process and to catalyze strategic decision making.

Table 13: Communication artifacts for the ROI process in SY24-25

Artifact (folder linked)	Chiefs	Board
Individual ROI Sheets	Review in 1-1's with Superintendent to explore the implementation and impact of each individual investment	NA
Dashboard	Facilitate various views/groupings of initiatives and support discussions in Cabinet	NA
"Initiatives at a Glance" Overview	Provide a backbone for discussions into how to adjust strategy toward student outcome goals.	Detail the reach of a sub-set of key investments that Dallas is making toward its student outcome goals
Presentation Materials	Detail how the ROI process maps to district strategy. Report how much of the district budget we have successfully captured in the process. Name adjustments for next year's ROI initiatives / process.	Provide update on CPM 3.2 Detail how the ROI process and investment evaluation framework maps to district strategy. Name how the results of the ROI process are influencing budget decisions.