

Personnel and Leadership

Year One Evidence

Mentor program development with structured activities: leadership goal setting, meetings, reflection protocols. Surveys or feedback forms, testimonials. Year 2 Implementation plan.

Define hiring process and time to hire and onboard
Increase targeted postings/Attendance at job fairs
Data of applicant pools
Stay focus group data
Annual staff profile
Wellness program in development

Professional development
Account oversight
Focus groups data
Budget oversight improvements




Year One Activities

Develop robust leadership mentor program


Review and improve process for recruitment and retainment of staff

Increase financial knowledge base across leadership team
Intake team
What would make more efficient in finance:




Strategic Goal Implementation Rubric: Administrative Mentoring

Process Step	 Not Implemented	 In Progress	 Implemented
1. Research Leadership Mentoring Best Practices	No research conducted; no sources or models identified.	Initial research underway; examples from other districts or literature being reviewed; gaps identified.	Comprehensive research completed; evidence-based best practices documented and summarized for program design.
2. Identify Goals & Objectives Based on Research	No goals defined; program purpose unclear.	Draft goals developed; partially aligned with research findings; feedback being gathered.	Program goals clearly defined, aligned with evidence-based best practices, and approved by leadership.
3. Develop Preliminary Program Structure	No program framework; mentor–mentee interactions undefined.	Draft structure created using insights from research; frequency, format, and activities under review.	Preliminary program structure finalized for pilot/Year One, reflecting best practices from research and tailored to district context.
4. Develop Training & Support Materials for Year One Pilot	No training materials or support resources prepared.	Draft materials created; informed by research; reviewed by leadership.	Training and support resources finalized for mentors and mentees; aligned with Year One best practice pilot goals.
5. Establish Feedback & Evaluation Plan	No evaluation process; program impact not tracked.	Feedback tools under development; pilot evaluation metrics being defined.	Feedback and evaluation plan implemented; data collected during Year One pilot to refine program for future years.

Strategic Goal Implementation Rubric: Strategies for Recruitment and Retainment

Process Step	 Not Implemented	 In Progress	 Implemented
1. Evaluate Staff Perception Surveys	No survey data collected or analyzed; no understanding of staff perceptions.	Surveys collected or partially analyzed; preliminary insights identified but not fully integrated into planning.	Staff perception surveys fully evaluated; findings inform recruitment and retention strategies; trends monitored over time.
2. Develop Retention Strategies Based on Survey Data	No retention strategies developed from survey insights.	Preliminary strategies drafted based on survey results; some feedback considered.	Retention strategies fully developed and aligned to survey findings; strategies implemented and monitored for effectiveness.
3. Review Onboarding Systems	No review conducted; onboarding process undefined or inconsistent.	Onboarding review in progress; gaps or inconsistencies identified but solutions not finalized.	Comprehensive onboarding system review completed; clear processes and protocols established; aligns with recruitment and retention goals.
4. Update Onboarding Systems	No updates made; new hires experience inconsistent orientation.	Updates drafted or piloted; partial implementation occurring; feedback being collected.	Onboarding system updated and fully implemented; new hires experience consistent, structured onboarding; effectiveness monitored.
5. Monitor & Adjust Strategy	No monitoring or adjustments; strategy not evaluated over time.	monitoring processes developed; adjustments considered but not yet formalized.	Ongoing monitoring and evaluation of recruitment and retention efforts; strategy refined based on data, feedback, and emerging needs.

Strategic Goal Implementation Rubric: Increase Financial Knowledge

Process Step	 Not Implemented	 In Progress	 Implemented
Intake from Administrators to Gather Data and Identify Needs	No defined or standardized method for collecting administrator input. Baseline financial knowledge, needs, and skill gaps are not systematically assessed.	Meetings are scheduled and guiding questions have been developed to support structured conversations with leadership groups.	Meetings with all administrator groups have been conducted
Intake from Administrative Assistants to Gather Data	No defined or standardized method for collecting administrative assistant input. Baseline financial knowledge, needs, and skill gaps are not systematically assessed.	Standardized method has been identified and guiding questions have been developed to assess financial knowledge, needs, and skill gaps.	Survey has been completed by all administrative assistants.
Identify Patterns of Need at Various Levels	Data related to financial knowledge and needs has been collected but not analyzed.	Some trends and patterns are identified informally but findings are not documented	Data has been analyzed and baseline financial knowledge, priority needs, and skill gaps have been identified at each level
Develop Plan to Address Needs	Systemic plan not identified, Needs addressed reactively	Plan has been identified and in process of being documented, training components are partially developed	Plan has been identified and documented. Training materials have been developed and ready for implementation