

Technical vs Tactical vs Strategic

Tips for Effective Monitoring Question Development

If the [goal being monitored](#) is, "The percentage of our economically disadvantaged graduates who have demonstrated career/college-level proficiency in collaboration skills and problem solving skills on the soft skills portfolio assessment will increase from 27% in August 2020 to 84% by August 2025", here are examples:

Technical (trying to understand how something is measured)

- What's the alignment of the portfolio assessment with the SAT or ACT?
- How do we know the validity of the portfolio assessment?
- What are the psychometric properties of the portfolio assessment?
- Why did we single out collaboration and problem solving skills from all the skills assessed?

Tactical (trying to understand how something is done)

- To whom is the assessment administered?
- Which staff have been trained to administer the assessment?
- What type of PD have staff received regarding the assessment?
- How do staff feel about the assessment?

Strategic (trying to understand how something aligns to the priorities)

- Looking at the data in table 1, which strategy was most effective with our target student population?
- What is a strategy we deployed that didn't work, given the data in table 2, and what did we learn?
- Based on the data in graph 1, why are we seeing such significant growth among our non-target student population but not our target student population?
- Why is the data in graph 2 showing that system performance on item a is so much higher than item b?

Focus & Timing

Technical questions focus on understanding the details surrounding the assessment and goal details themselves. Tactical questions focus on understanding the details surrounding implementation of the assessment and goal. Strategic questions focus on understanding, relative to the goal, what we've learned about system performance and what lessons we've learned from that performance. No questions during an effective monitoring conversation are focused on providing advice to the superintendent, board member opinions about system performance, or efforts to project manage the school system.

Technical and tactical questions are often essential to having a full understanding of current system performance; there is nothing wrong with board members asking technical and tactical questions. Timing matters, however. The superintendent is expected to be the strategic leader over the school system's operations. During a monitoring conversation with the superintendent, it is unreasonable to expect them to also have a mastery of every technical or tactical detail. So if school board members want answers to those questions to be part of the monitoring conversation, they need to ask the questions at least five to seven days in advance of the monitoring session. If that hasn't happened, board members are welcome to still ask new technical and tactical questions during the monitoring session, but the board chair and/or superintendent should advise them that the answers will go out in the next update from the superintendent to the board.

Past vs Future

Regardless of whether or not a question is technical, tactical, or strategic in focus, they can just as easily focus on past actions -- what have our strategies been and what have been the impacts on performance -- as on future actions -- what strategies will we deploy given what our performance currently shows. Boards that are monitoring effectively will invest the majority of their time -- preferably upwards of $\frac{3}{4}$ of the monitoring session -- focused on understanding the past: where are we, how did we get here, what worked, what didn't work, what did we learn? Only once a board is fully conversant in and knowledgeable of what has happened can it meaningfully engage in future-focused dialogue.

Ineffective boards succumb to the temptation of mostly focusing on technical/tactical, their opinions and statements, or what will happen next. These are weaknesses of discipline and vision and should be corrected.