2.3.A Progress Report for St. Croix Prep's Strategic Plan

5 year tracking sheet

Qtr 1	
Date and Year of Report	November 2026 (Quarter 1, 2026-2027 school year)
Strategy (Example-1.1.A: Develop a K–12 Academic Excellence Framework)	2.3.A Clarify Operational Roles and Service Standards
Action Plan (Example-Develop a written Academic Excellence Framework document)	Establish defined service standards and expectations for all staff.
Leader Responsible	Peggy Rosell

Overall Status

- ☑ **On Track** – Progress is occurring as planned
- ☐ **Some Concern** – Progress is occurring, but adjustments are needed
- ☐ **Off Track** – Significant barriers are affecting implementation
- ☐ **Completed** – Quarter or initiative expectations have been met

1. Executive Summary

In 3–5 sentences, summarize what occurred during this quarter. Identify the most important accomplishments, emerging concerns, and whether implementation is proceeding as planned.

Quarter Summary

Quarter 1 established a foundation for clearer staff service standards. The Staff Portal and Ask Leo launched, and staff were notified of these resources. Team discussion and office-staff feedback identified procedures needing clarification, particularly purchasing, athletics, sports banquets, and CEU tracking. Implementation is on track, although process documentation and evidence of staff adoption remain outstanding.

2. Describing Implementation

Briefly describe how the initiative is being implemented. Include relevant grade spans, departments, programs, staff groups, or phases of implementation. For this quarter, focus on what has actually begun or been completed rather than restating the original plan.

Implementation Update
The September 17 team meeting focused on onboarding information, finding answers independently, and identifying unclear procedures. Peggy was assigned to solicit input from Office Managers and Front Office staff through a Google Doc. At the November 17 meeting, the team reviewed feedback and identified the need to identify procedures/processes to document. Chad also reported that the Staff Portal and Ask Leo were available, with additional guidance planned for November 25 professional development.

3. Monitoring Progress

Process Benchmarks

Report the quarter actions that were expected to occur. Indicate whether each benchmark was completed as planned.

Status Options: Not Started | In Progress | Met | Delayed | Revised

Process Benchmark	Person Responsible	Target Date	Status	Qtr Update / Evidence
Create and send Google Doc to office staff	Peggy	September 2026	In Progress	Assigned September 17; feedback document reviewed November 17. Distribution date not confirmed.
Launch Staff Portal and Ask Leo	Chad	November 2026	Met	Both resources reported launched November 17.

Identify and document division-specific processes	Division/administrative leads	To be determined	In Progress	Purchasing, athletics, sports banquets, and CEU tracking identified; documentation remains to be completed.

Progress Summary	
What has gone well?	Shared staff resources are available, and initial feedback has identified specific procedures to address.
What has been challenging?	Purchasing authority, athletics-related procedures, and CEU tracking lack sufficiently clear guidance.
Describe any benchmarks that needed revising.	No formal revisions recorded. Assign owners and dates for outstanding documentation.

4. Measuring Impact

Early Evidence of Change

Report any early evidence showing that implementation is beginning to affect practice, behavior, attitudes, systems, or student outcomes. Quarter evidence may be preliminary.

Early Evidence of Change Benchmark	Measure / Evidence Used	Person Responsible	Target Date	Status / Qtr Result
Centralized staff information available	Staff Portal and Ask Leo launch reported	Chad	November 2026	Launched; usage and effectiveness not yet measured
Staff questions and process gaps identified	Office staff feedback document and team discussion	Peggy / 2.3.A team	November 2026	Feedback reviewed; completion and coverage not confirmed
Staff awareness of new resources	Email announcement; planned PD training	Chad	November 25, 2026	Email sent; training planned

What are we learning?	
What does the Qtr evidence suggest about whether the initiative is having its intended impact?	Centralized tools and staff feedback provide a starting point, but improved consistency has not yet been demonstrated. Adoption and process clarity should be measured after guidance is published.

Data not yet available	
Identify important outcome measures that will not be available until later in the year.	Staff use of the Portal and Ask Leo; ability to find answers independently; completed and approved procedures; staff perceptions of clarity.

5. Resources Supporting Implementation

Identify significant people, time, materials, technology, professional development, or funding used during the quarter. Note any anticipated resource changes.

Resource	Existing Resource / Expanded Use	Reallocation or Reassignment	New Resource / Cost	Qtr Update / Notes
Staff time and input	Office Managers, Front Office staff, 2.3.A team	None documented	None documented	Feedback gathering and process identification
Technology tools	Staff Portal and Ask Leo	None documented	Cost not provided	Both launched; website infrastructure

				transition planned
Training and communications	Chad email and planned Nov. 25 PD training	None documented	None documented	Nov. 25th

Resource Concerns

- ☑ No additional resources anticipated at this time
- ☐ Additional resources may be needed
- ☐ Reallocation of existing resources is recommended
- ☐ Budget adjustment may be necessary

Explanation, if applicable:	No additional funding has been identified. Staff time is needed to finalize and publish guidance.

6. Communication Plan

Identify significant communication completed during the quarter and upcoming communication related to this initiative.

Communication / Audience	Person Responsible	Date	Status	Qtr Update / Next Step
Staff announcement: Portal and Ask Leo	Chad	By Nov. 17, 2026	Met	Email sent to staff
AI training during PD day	Chad	Nov. 25, 2026	Planned	Include Portal/Ask Leo guidance
Cabinet discussion: process documentation	2.3.A team / Cabinet	To be determined	Planned	Add topic to Cabinet Meeting agenda

7. Challenges, Risks, and Adjustments

Identify any barriers or emerging issues that could affect successful implementation. Explain what is being done in response.

Challenge / Risk	Impact on Initiative	Response / Adjustment
Unclear purchasing and parent-group pathways	Inconsistent decisions and staff guidance	Ask Kevin about school-dollar purchases; clarify pathway and parent-group 501(c)(3) questions.
Division-specific processes not yet defined	Staff may continue relying on informal answers	Identify athletics process; Keven and Carrie to clarify sports banquets; Deanna to clarify CEU tracking, etc.
Portal content and adoption incomplete	New tools may not yet deliver consistent service	Collect, approve, and publish process documents; reinforce use through training and Cabinet follow-up.

If no significant concerns exist, state: **No significant barriers have been identified at this time.**

8. Priorities for next quarter

Identify the 3–5 most important actions or outcomes expected during the next reporting period.

Next Quarter Priority	Person Responsible	Target Date
1. Collect and prioritize staff questions and process gaps	Peggy / 2.3.A team	Quarter 2; date TBD
2. Identify processes that need to be documented for clarification.	Cabinet/Relevant leaders	Quarter 2; date TBD
3. Assign owners to identified processes	2.3.A team / Cabinet	Quarter 2; date TBD
4. Publish approved guidance in Staff Portal and reinforce staff use	Chad / division leads	Quarter 2; date TBD
5.		

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9. Board-Level Summary

Overall Quarter Assessment:

- ☑ On Track
- ☐ Some Concern
- ☐ Off Track
- ☐ Completed

One key accomplishment the Board should know	The Staff Portal and Ask Leo launched as centralized staff resources
One issue or decision the Board should be aware of	Key operational procedures still need documented ownership and clear standards.

Board action needed at this time:

- ☑ None
- ☐ Information/Discussion
- ☐ Policy Direction
- ☐ Budget/Resource Approval