St. Croix Prep's Strategic Plan

5 year tracking sheet

Qtr 1	
Date and Year of Report	**Nov 17, 2026**
Strategy (Example-1.1.A: Develop a K–12 Academic Excellence Framework)	**4.2.A: Establish Clear Financial Communication Practices**
Action Plan (Example-Develop a written Academic Excellence Framework document)	**Strengthen the culture of trust and transparency around the school's financial health.**
Leader Responsible	**Kevin Fitton, Finance Director**

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

During this quarter, the committee began establishing a foundation for improving financial transparency, communication, and stakeholder understanding of district finances. With a new Finance Director joining the work, discussions focused on providing historical context regarding the district's financial position, identifying stakeholder information needs, and developing a brief five-question survey to assess current perceptions of financial knowledge and transparency. Teacher representatives also shared concerns about inconsistent communication regarding the $250 classroom supply allocation, highlighting an opportunity to improve clarity and consistency in financial procedures. While implementation remains in the early stages, the committee has identified actionable next steps, and the initiative is progressing with some adjustments needed to accommodate the leadership transition.

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
Implementation is currently focused on gathering baseline information, identifying communication gaps, and establishing shared understanding among committee members. The new Finance Director has participated in one of three committee meetings, using this initial engagement to learn about the district's financial history, current circumstances, and stakeholder perspectives. During the most recent meeting, committee members collaboratively developed a five-question stakeholder survey intended to assess understanding of district finances and perceptions of financial transparency. The survey is being prepared for distribution, with results expected to inform future communication strategies and committee priorities. Teacher representatives also provided feedback regarding the $250 classroom supply allocation, noting differences in how information and expectations have been communicated. This feedback identified a specific area for further review and potential clarification. Implementation remains in the initial information-gathering and planning phase, with more substantive actions anticipated after survey results are collected and reviewed.

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
Develop stakeholder survey addressing financial understanding and transparency	4.2 Group	This quarter	Met	Committee has already drafted survey to go out
Identify communication concerns and opportunities based on survey responses	4.2 Group	Q2	In Progress	Pending, waiting on results.

Progress Summary	
What has gone well?	Committee members engaged in productive discussion, shared historical context, and collaboratively developed a concise survey. Teacher representatives provided practical feedback that will help inform future improvements.
What has been challenging?	The new director just started in Oct, so there is a lag time in order to get up to speed in relation to the timing of this report.
Describe any benchmarks that needed revising.	No formal benchmarks as yet, pending based on survey data. Some preliminary drafting has taken

	place in the meantime.

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
Establish baseline stakeholder understanding of district finances	Five-question stakeholder survey	Finance Director / Committee	Next Quarter	In Progress — Survey developed; results pending.

What are we learning?	
What does the Qtr evidence suggest about whether the initiative is having its intended impact?	Initial committee discussions suggest that improving financial transparency will require attention not only to the information shared with stakeholders but also to the clarity and consistency of financial communication. Feedback regarding classroom supply allocations provides an early example of how differing messages can create uncertainty among staff. The committee's development of a stakeholder survey represents an important first step toward establishing baseline information and identifying specific areas for improvement. At this stage, there is insufficient evidence to determine whether the initiative is producing measurable changes in stakeholder understanding or

	confidence.

Data not yet available	
Identify important outcome measures that will not be available until later in the year.	Stakeholder survey results are not yet available. These results will provide preliminary information about financial knowledge, perceived transparency, and areas where additional communication may be beneficial. Evidence of improvements in stakeholder understanding, consistency of financial procedures, and confidence in district financial communication will require additional follow-up later in the year.

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
Finance Director	Existing leadership position	None anticipated	None anticipated	Initial participation and orientation to committee priorities.
Committee Members	Existing staff and stakeholder participation	None anticipated	None anticipated	Members contributed institutional knowledge and survey development.

Survey Platform	Anticipated use of existing district tools	None anticipated	None anticipated	Five-question survey prepared for distribution.
Staff Time	Existing meeting and administrative time	Additional follow-up time may be needed	None anticipated	Time needed for survey analysis and review of communication practices.

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:	Current work is expected to be supported through existing staff time, committee participation, and district communication tools. Resource needs can be reassessed as survey results inform subsequent activities.

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
Financial background and district context / Committee	Committee Members / Finance Director	This Quarter	Met	Initial discussion supported the new director's understanding of district finances and history.
Stakeholder financial knowledge and transparency survey	Finance Director / Committee	Near Term	In Progress	Five-question survey developed; distribution pending.

Survey findings and implications / Committee and District Leadership	Finance Director	Next Quarter	Not Started	Review results and identify communication priorities.

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
Limited baseline data regarding stakeholder financial understanding	Difficult to assess current transparency or identify the most significant information gaps.	Distribute the stakeholder survey and use results to guide future actions.

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. Finalize and distribute the five-question stakeholder survey.	Finance Director / Committee	Early Next Quarter
2. Review and summarize survey results to identify strengths and areas for improvement.	Finance Director / Committee	Next Quarter

3. Clarify expectations and communication regarding the $250 classroom supply allocation.	Finance Director / Committee	Next Quarter
4. Continue developing the Finance Director's understanding of historical district financial decisions and current priorities.	Finance Director / Committee	Ongoing
5. Identify initial recommendations for improving financial communication and transparency based on stakeholder feedback.	Finance Director / Committee	End of Next Quarter

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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 director is quickly getting up to speed and conversations in the working group have been frank and productive.
One issue or decision the Board should be aware of	Due to the timing of the director on-boarding, the group has lost a bit of time in Q1 that could have been further along.

Board action needed at this time:

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