District Review Self-Assessment

**Purpose**

The district self-assessment tool helps districts reflect on their systems and practices according to DESE’s District Standards and Indicators, which define effective district practice in six areas:

* Leadership and Governance
* Curriculum and Instruction
* Assessment
* Human Resources and Professional Development
* Student Support
* Financial and Asset Management

The self-assessment, in combination with other data, will inform DESE’s decision of whether the targeted review will focus on governance and administrative systems (the Leadership and Governance, Human Resources and Professional Development, and Financial and Asset Management standards) or student-centered systems (the Curriculum and Instruction, Assessment, and Student Support standards). Both types of targeted reviews include classroom observations.

**Using the Tool**

The self-assessment lists each indicator within a standard and provides examples of effective practice for each indicator. Note that the examples are not an exhaustive list; please refer to the full District Standards and Indicators when completing the self-assessment. Please consider how well each indicator describes current practices in the district overall. Please also answer the question at the end of each indicator about the reasons for the ratings chosen. Districts are encouraged to submit any documents and data that illustrate these practices. Reflection questions are also included in the document. While it is not required or expected, districts are welcome to add brief information or explanations to any part of the self-assessment.

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## Initial Reflection Questions

1. Who is participating in completing this self-assessment (list titles/roles)?
2. In what ways has the district successfully addressed issues of equity, including racial equity, for students or groups of students?
3. What challenges related to equity, including racial equity, does your district confront? How have you begun to address these challenges?
4. Are there any particular district systems, policies, or practices that you would like the district review to address?

## Standard 1: Leadership and Governance

School committees, district leaders, school leaders, and advisory council members work collaboratively and strategically to promote high-quality teaching and learning that is antiracist, inclusive, multilingual, and multicultural; that values and affirms each and every student and their families; and that creates equitable opportunities and experiences for all students, particularly those who have been historically underserved. They establish, implement, and evaluate policies, plans, procedures, systems, and budgets with a primary focus on achieving districtwide strategic objectives, in part through equitable and effective use of resources, that ultimately lead to high-quality teaching and learning for all students.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Indicator 1:** **Leadership and Governing Structures**  The district has a clear leadership and governance structure in which individuals and teams carry out their roles that support district functions and advance equitable student outcomes. | | **How well does this indicator describe**  **your district’s current practices?  Put an X in the box that represents your rating** | | | |
| **Not at all well** | **Somewhat well** | **Well** | **Very well** |
| 1. School Committee | The district has a school committee with a working governance structure that fulfills its statutory responsibilities, sets educational district goals, and advances policies and programs that provide all students, particularly those from historically underserved groups and communities, with equitable opportunities to excel in all areas across all grades. |  |  |  |  |
| 1. District Leadership Team | The superintendent establishes and leads an effective leadership teaming structure that attends to strategic planning, resource allocation, implementation, professional development, and monitoring for both instruction and operations. |  |  |  |  |
| 1. School Leadership Teams | The district supports every school in establishing a diverse and representative team of leaders that implements policies, programs, and practices that advance school priorities and are aligned with the district’s educational vision and strategic goals (see Strategic Planning, Implementation, and Monitoring indicator below). |  |  |  |  |
| 1. School and Parent Advisory Councils | In alignment with state statute and regulation, the district and schools support the convening of representative School Councils, a districtwide Special Education Parental Advisory Council (SEPAC), and - for districts serving 100 or more ELs - an English Learner Parent Advisory Council (ELPAC). |  |  |  |  |
| Please explain the reasons for your responses above in a few sentences (the table will expand as you enter your answer). If there are documents or data that illustrate your responses, please feel free to list and submit them along with this self-assessment. | | | | | |

## Standard 1: Leadership and Governance (cont.)

| **Indicator 2: Strategic Planning, Implementation, and Monitoring**  The district grounds its work in a clear vision for student learning and advances this vision through strategic planning practices, systematic implementation, and progress monitoring. | | How well does this indicator describe  your district’s current practices?  Put an X in the box that represents your rating | | | |
| --- | --- | --- | --- | --- | --- |
| Not at all well | Somewhat well | Well | Very well |
| 1. District Mission/Vision | The district develops and disseminates a meaningful mission and/or vision statement based on staff, student, family, and community input that reflects DESE’s Educational Vision. |  |  |  |  |
| 1. District Planning | The district develops an evidence-based three-year District Improvement Plan (often referred to as a strategic plan) and a Student Opportunity Act plan that drive the development, implementation, and modification of educational programs and practices so that students attain academic knowledge and skills, understand and value self and others, and engage with the world. |  |  |  |  |
| 1. School Improvement Planning | The principal of each school, in consultation with its School Council, develops a School Improvement Plan. |  |  |  |  |
| 1. Implementation and Progress Monitoring | District and school leaders act upon existing plans and have formal processes in place to assess implementation and success and communicate progress with their communities. |  |  |  |  |
| Please explain the reasons for your responses above in a few sentences (the table will expand as you enter your answer). If there are documents or data that illustrate your responses, please feel free to list and submit them along with this self-assessment. | | | | | |

## Standard 1: Leadership and Governance (cont.)

| **Indicator 3:** **District Culture**  The district establishes and maintains a leadership culture in which all leaders contribute to mutual accountability and strong working relationships. This culture enables leaders to make challenging, sometimes unpopular, decisions to advance student opportunities and outcomes. Additionally, the district prioritizes the inclusion of multiple stakeholders to shape decision-making and invests in strategies that maintain leadership and governing stability in the event of leadership turnover. | | How well does this indicator describe  your district’s current practices?  Put an X in the box that represents your rating | | | |
| --- | --- | --- | --- | --- | --- |
| Not at all well | Somewhat well | Well | Very well |
| 1. Mutual Accountability | Together, the school committee, superintendent, and district-level administrators set a tone for the district in which stakeholders (including students, families, district leaders, school leaders, union leaders, teachers, and other school staff) collaborate, make decisions, and exercise agency in advancing opportunities and outcomes for all students. |  |  |  |  |
| 1. Working Relationships | Elected leaders, district leaders, and school leaders have clearly defined roles and maintain strong working relationships, which they leverage to advance the district’s mission/vision, strategic objectives, and improvement plans. |  |  |  |  |
| 1. Leadership Stability | The district develops systems that recruit and retain diverse leaders to promote stability and sustain district initiatives in the event of leadership turnover. |  |  |  |  |
| 1. Stakeholder Engagement | The district partners with all key stakeholders and intentionally reaches out to underserved communities and groups to explicitly seek their involvement in district decision-making. |  |  |  |  |
| Please explain the reasons for your responses above in a few sentences (the table will expand as you enter your answer). If there are documents or data that illustrate your responses, please feel free to list and submit them along with this self-assessment. | | | | | |

## Standard 2: Curriculum and Instruction

Curricular materials and classroom instruction are central to student learning, opportunities, and outcomes. A shared instructional vision, anchored in culturally and linguistically sustaining practices, guides all curricular and instructional decisions toward equitable outcomes for all students. The district pairs high expectations with individualized supports so that every student can engage in deeper learning and develop the knowledge and skills that will prepare them to succeed in college and/or the workplace.

| **Indicator 1****: Instructional Leadership**  The district supports teaching and learning by developing structures and setting expectations for instructional leadership. | | How well does this indicator describe  your district’s current practices?  Put an X in the box that represents your rating | | | |
| --- | --- | --- | --- | --- | --- |
| Not at all well | Somewhat well | Well | Very well |
| 1. Instructional Vision | The district has a clear instructional vision that centers the needs and experiences of all students, particularly students from historically underserved groups and communities. |  |  |  |  |
| 1. Implementation, Monitoring, and Continuous Improvement | The district has systems in place to implement, monitor, and continuously improve upon the instructional vision and related initiatives. |  |  |  |  |
| Please explain the reasons for your responses above in a few sentences (the table will expand as you enter your answer). If there are documents or data that illustrate your responses, please feel free to list and submit them along with this self-assessment. | | | | | |

## Standard 2: Curriculum and Instruction (cont.)

| **Indicator 2:** **Curriculum and Instructional Materials**  The district selects and invests in high-quality, evidence-based curricular materials so that students can interact with grade-level curricula, which can be appropriately scaffolded to meet the needs of all learners. | | How well does this indicator describe  your district’s current practices?  Put an X in the box that represents your rating | | | |
| --- | --- | --- | --- | --- | --- |
| Not at all well | Somewhat well | Well | Very well |
| 1. Curricular Review and Selections | The district has a comprehensive and equity-driven process in place for regularly reviewing and selecting curricular materials that align with its instructional vision. This process aligns with the IMplement MA Process. |  |  |  |  |
| 1. High-Quality Instructional Materials (HQIM) | The district implements high-quality curriculum and instructional materials that align with the Massachusetts Curriculum Frameworks and WIDA 2020 standards, for all content areas and grade levels. |  |  |  |  |
| Please explain the reasons for your responses above in a few sentences (the table will expand as you enter your answer). If there are documents or data that illustrate your responses, please feel free to list and submit them along with this self-assessment. | | | | | |

## Standard 2: Curriculum and Instruction (cont.)

| **Indicator 3****: Equitable Practices and Access**  The district maintains a culture of high expectations by pairing students with individualized supports, examining equity in their instruction and programming, and offering a variety of academic courses and extracurricular opportunities. | | How well does this indicator describe  your district’s current practices?  Put an X in the box that represents your rating | | | |
| --- | --- | --- | --- | --- | --- |
| Not at all well | Somewhat well | Well | Very well |
| 1. Academic Interventions | The district applies academic interventions as part of an adaptable Multi-Tiered System of Support (MTSS) that targets students’ specific needs, challenges all learners, and supports all students in accessing the general curriculum (see Student Support). |  |  |  |  |
| 1. Support for Historically Underserved Students: | The district provides historically underserved students, particularly those who are marginalized based on race, ethnicity, disability status, and linguistic background, with the individualized supports and services they need to access the curriculum, recognizes and builds upon students’ existing strengths, and uses data to monitor outcomes and adjust where needed. |  |  |  |  |
| 1. Equitable Access to Coursework | The district provides all students with equitable access to a range of rigorous coursework in all grades, including content areas not subject to statewide testing, advanced courses, electives, and career and technical education courses. |  |  |  |  |
| Please explain the reasons for your responses above in a few sentences (the table will expand as you enter your answer). If there are documents or data that illustrate your responses, please feel free to list and submit them along with this self-assessment. | | | | | |

## Standard 2: Curriculum and Instruction (cont.)

| **Indicator 4:** **Effective Instruction and Curricular Implementation**  The district supports schools in creating safe and supportive learning environments, culturally and linguistically sustaining grade-level instruction, and opportunities to engage deeply with academic content. | | How well does this indicator describe  your district’s current practices?  Put an X in the box that represents your rating | | | |
| --- | --- | --- | --- | --- | --- |
| Not at all well | Somewhat well | Well | Very well |
| 1. Learning Culture | The district develops safe and supportive learning environments in which all students can engage in academic content. |  |  |  |  |
| 1. District Systems for Curricular Implementation | The district sets expectations for and supports educators in implementing lessons that reflect grade-level content standards and WIDA English Language Development standards. |  |  |  |  |
| 1. Classroom Instruction | The district works with school and instructional leaders to support teachers in implementing evidence-based and culturally and linguistically sustaining instructional practices. |  |  |  |  |
| Please explain the reasons for your responses above in a few sentences (the table will expand as you enter your answer). If there are documents or data that illustrate your responses, please feel free to list and submit them along with this self-assessment. | | | | | |

## Standard 3: Assessment

Through the establishment of strategic data and assessment systems, the district supports a robust, data-centered culture. The district collects an array of data and uses it to inform decisions at the classroom, school, and district levels. By analyzing assessment results and other data, educators develop an understanding of the whole student, can examine trends across student groups, and can adjust their instruction accordingly. The data and assessment systems, therefore, undergird the district’s efforts to advance equitable student experiences and outcomes.

| **Indicator 1:** **Data Collection**  The district maintains data collection systems that are consistent across schools, intentional in the information they collect, and provide educators with multiple data points to provide a comprehensive picture of each student. | | How well does this indicator describe  your district’s current practices?  Put an X in the box that represents your rating | | | |
| --- | --- | --- | --- | --- | --- |
| Not at all well | Somewhat well | Well | Very well |
| 1. Multiple Data Sources | The district gathers multiple types of academic and non-academic data about each student to inform a comprehensive understanding of each student’s achievement, growth, and the opportunity barriers they may face. |  |  |  |  |
| 1. Assessment Strategy | The district strategically selects and implements assessments that provide the necessary data to inform instruction and programming while not overburdening administrators, teachers, and students. |  |  |  |  |
| 1. Assessing for Equity | The district positions assessment as a critical piece of a larger commitment to equity and is responsive to feedback around its assessment strategy. |  |  |  |  |
| Please explain the reasons for your responses above in a few sentences (the table will expand as you enter your answer). If there are documents or data that illustrate your responses, please feel free to list and submit them along with this self-assessment. | | | | | |

## Standard 3: Assessment (cont.)

| **Indicator 2:** **Data Use and Culture**  The district maintains a robust data culture by disseminating a clear vision for data collection and use, building data literacy amongst staff, creating structures for assessment implementation and data review, and connecting student results to concrete instructional changes and available interventions. | | How well does this indicator describe  your district’s current practices?  Put an X in the box that represents your rating | | | |
| --- | --- | --- | --- | --- | --- |
| Not at all well | Somewhat well | Well | Very well |
| 1. Data Vision | District, school, and classroom-level leaders have a shared understanding of how data collection and use are connected to the district’s broader instructional vision and strategic priorities. |  |  |  |  |
| 1. Strategic Planning and Continuous Improvement | The district collects, analyzes, and triangulates multiple data points, including particularly disaggregated student group data, to inform district planning, decision-making, policies, and practices. |  |  |  |  |
| 1. Data Literacy and Access | The district provides educators with access to relevant data and the resources necessary to understand and analyze it. |  |  |  |  |
| 1. Data Review and Implementation | The district sets expectations around reviewing student data and develops structures that facilitate regular cycles of data review and adjustments to instruction. |  |  |  |  |
| Please explain the reasons for your responses above in a few sentences (the table will expand as you enter your answer). If there are documents or data that illustrate your responses, please feel free to list and submit them along with this self-assessment. | | | | | |

## Standard 3: Assessment (cont.)

| **Indicator 3:** **Sharing Data**  The district shares assessment results and other data with students and their families in ways that are clear, timely, and easily utilized. | | How well does this indicator describe  your district’s current practices?  Put an X in the box that represents your rating | | | |
| --- | --- | --- | --- | --- | --- |
| Not at all well | Somewhat well | Well | Very well |
| 1. Communication with Students | The district sets expectations around engaging all students in goal setting and data review in ways that are developmentally appropriate and promote student agency. |  |  |  |  |
| 1. Communication with Families | The district regularly communicates evidence of student, school, and district performance (see Student Support). |  |  |  |  |
| 1. Grading | The district implements a transparent and accessible grading system that is calibrated across schools and communicates students’ progress and performance. |  |  |  |  |
| 1. Data Privacy | The district safeguards all students’ confidential data. |  |  |  |  |
| Please explain the reasons for your responses above in a few sentences (the table will expand as you enter your answer). If there are documents or data that illustrate your responses, please feel free to list and submit them along with this self-assessment. | | | | | |

## Standard 4: Human Resources and Professional Development

The district has established systems, policies, and practices that allow administrators to effectively recruit, hire, onboard, and support a highly effective, diverse, and culturally responsive workforce. The district develops effective systems and structures that provide all educators with ongoing access to high-quality professional learning and actionable feedback, and establishes a culture that fosters collaboration, retention, recognition, and advancement.

| **Indicator 1: Human Resources Infrastructure, Policies, and Practices**  The district has the proper infrastructure in its central office to process all human resources functions and uphold its policies and procedures. | | How well does this indicator describe  your district’s current practices?  Put an X in the box that represents your rating | | | |
| --- | --- | --- | --- | --- | --- |
| Not at all well | Somewhat well | Well | Very well |
| 1. Infrastructure and Human Resources Capacity | The district has the necessary staff, along with efficient systems, to maintain employee records, control positions, post vacancies, and track employee time and attendance. |  |  |  |  |
| 1. Policies and Procedures | The district has clear human resources policies and procedures in place that are accessible, set expectations, and provide sufficient support for district staff. |  |  |  |  |
| Please explain the reasons for your responses above in a few sentences (the table will expand as you enter your answer). If there are documents or data that illustrate your responses, please feel free to list and submit them along with this self-assessment. | | | | | |

## Standard 4: Human Resources and Professional Development (cont.)

| **Indicator 2:** **Staffing**  The district implements effective practices to hire and sustain a healthy and productive workforce. | | How well does this indicator describe  your district’s current practices?  Put an X in the box that represents your rating | | | |
| --- | --- | --- | --- | --- | --- |
| Not at all well | Somewhat well | Well | Very well |
| 1. Recruitment, Hiring, and Onboarding | The district has policies and processes in place to effectively recruit, hire, and onboard new staff in support of a diverse and culturally responsive workforce, and in accordance with DESE’s hiring guide. |  |  |  |  |
| 1. Educator Assignment | To the extent possible, the district equitably distributes licensed, effective educators across its schools. |  |  |  |  |
| 1. Educator Evaluation | The district implements a strategic, transparent system for evaluation that includes all required components of the Massachusetts Educator Evaluation Framework and promotes educators’ continuous improvement in support of the district’s vision and priorities. |  |  |  |  |
| 1. Recognition and Advancement | The district administers formal systems for staff recognition, provides resources to support professional learning outside the district, and develops pathways for highly effective staff to advance in their careers. |  |  |  |  |
| 1. Retention | The district implements effective retention strategies and creates the conditions to retain diverse, effective educators. |  |  |  |  |
| 1. Working Environment | The district fosters a positive, productive, and inclusive work environment for all staff, particularly those from historically underserved groups and communities, in which all educators develop a sense of belonging. |  |  |  |  |
| Please explain the reasons for your responses above in a few sentences (the table will expand as you enter your answer). If there are documents or data that illustrate your responses, please feel free to list and submit them along with this self-assessment. | | | | | |

## Standard 4: Human Resources and Professional Development (cont.)

| **Indicator 3:** **Professional Learning**  The district offers comprehensive professional learning opportunities for staff. Through observation and feedback, professional development, collaboration structures, and targeted supports, the district provides educators with the resources and guidance they need to support all students. | | How well does this indicator describe  your district’s current practices?  Put an X in the box that represents your rating | | | |
| --- | --- | --- | --- | --- | --- |
| Not at all well | Somewhat well | Well | Very well |
| 1. Observation and Feedback | The district supports school leaders in implementing job-embedded coaching and cycles of observation and feedback for all educators, within and beyond the educator evaluation system. |  |  |  |  |
| 1. Professional Development Opportunities | Based on classroom observations and educator evaluations, the district provides ongoing evidence-based, data-informed, and relevant professional development opportunities that are aligned with the Massachusetts Professional Development Standards. |  |  |  |  |
| 1. Collaboration Time | The district works with school leaders to develop schedules that allow for regular professional learning and collaborative planning time within and across subject areas and grade levels. |  |  |  |  |
| 1. New Educator Supports | The district concentrates resources so that novice teachers, school leaders, and staff who are new to the district receive supports that align with regulatory and licensure requirements, state guidelines, as well as the district’s improvement plan and instructional vision. |  |  |  |  |
| 1. Supports for Non-Instructional Staff | The district onboards, trains, coaches, and provides professional development opportunities for its non-instructional staff (such as administrative support staff, food service employees, custodians, technology staff, etc.), so that employees can hone their skills and enable educators to achieve success with their students. |  |  |  |  |
| Please explain the reasons for your responses above in a few sentences (the table will expand as you enter your answer). If there are documents or data that illustrate your responses, please feel free to list and submit them along with this self-assessment. | | | | | |

## Standard 5: Student Support

The district supports the whole student by creating safe and supportive environments, meeting students’ health and wellbeing needs, and engaging all families. These supports are built on a robust Multi-Tiered System of Support (MTSS) that flexibly assesses and addresses each student’s academic, social emotional, and behavioral strengths and needs.

| **Indicator 1:** **Safe and Supportive School Climate and Culture**  The district builds a supportive environment for all learners in which students are physically, emotionally, and mentally safe, as well as motivated to attend school and participate in leadership opportunities. | | How well does this indicator describe  your district’s current practices?  Put an X in the box that represents your rating | | | |
| --- | --- | --- | --- | --- | --- |
| Not at all well | Somewhat well | Well | Very well |
| 1. Safe and Supportive Learning Environments | The district uses evidence-based, culturally and linguistically sustaining practices to create safe and supportive learning environments in which all students, staff, and families develop a sense of safety, connection, and belonging to the school and/or district community. |  |  |  |  |
| 1. Student Attendance | The district implements effective strategies to increase attendance and engagement to prevent and mitigate the effects of chronic absenteeism. |  |  |  |  |
| 1. Student Voice and Leadership | The district creates opportunities for all students to exercise voice and leadership at the classroom, school, district, community, and state levels. |  |  |  |  |
| Please explain the reasons for your responses above in a few sentences (the table will expand as you enter your answer). If there are documents or data that illustrate your responses, please feel free to list and submit them along with this self-assessment. | | | | | |

## Standard 5: Student Support (cont.)

| **Indicator 2:** **Health and Wellbeing**  The district provides services and instruction around health and wellbeing to support students in accessing appropriate care and developing the knowledge and skills needed to lead health-promoting lives. | | How well does this indicator describe  your district’s current practices?  Put an X in the box that represents your rating | | | |
| --- | --- | --- | --- | --- | --- |
| Not at all well | Somewhat well | Well | Very well |
| 1. Comprehensive Health and Physical Education | The district offers health and physical education, aligned with the Massachusetts Comprehensive Health and Physical Education Frameworks, to all students. |  |  |  |  |
| 1. Physical Activity, Sports, and Recess | The district provides students with multiple opportunities to engage in physical activity and strengthen their bodies while attending school. |  |  |  |  |
| 1. Nursing and Health | The district provides school nurses at each school site who provide access to health services. |  |  |  |  |
| 1. Mental and Behavioral Health | The district implements tiered mental and behavioral health services that support all students’ mental and emotional wellness. |  |  |  |  |
| 1. Wellness Policy | The district maintains a local wellness policy, as required by law, that helps the district establish an environment that prioritizes student health, well-being, and the ability to learn. |  |  |  |  |
| Please explain the reasons for your responses above in a few sentences (the table will expand as you enter your answer). If there are documents or data that illustrate your responses, please feel free to list and submit them along with this self-assessment. | | | | | |

## Standard 5: Student Support (cont.)

| **Indicator 3:** **Family and Community Partnerships**  The district partners with families and community organizations to support all students. Through genuine outreach and employing strategies (such as those outlined in the Family Communication Toolkit), the district builds positive and authentic relationships in which all stakeholders support student experiences. | | How well does this indicator describe  your district’s current practices?  Put an X in the box that represents your rating | | | |
| --- | --- | --- | --- | --- | --- |
| Not at all well | Somewhat well | Well | Very well |
| 1. Family Partnerships and Communication | The district and its schools build culturally responsive, authentic, and trusting relationships with all families that position them as equal partners in their students’ education. |  |  |  |  |
| 1. Community Partnerships | The district works with organizations in its community to provide services and enriching experiences to students and families during and outside of the school day. |  |  |  |  |
| 1. Wraparound Supports | The district connects all students, particularly its most vulnerable students and families with wraparound supports. |  |  |  |  |
| Please explain the reasons for your responses above in a few sentences (the table will expand as you enter your answer). If there are documents or data that illustrate your responses, please feel free to list and submit them along with this self-assessment. | | | | | |

## Standard 5: Student Support (cont.)

| **Indicator 4:** **Multi-Tiered Systems of Support (MTSS)**  The district meets the academic, social emotional, and behavioral strengths and needs of all students through a robust and fluid MTSS system. The MTSS system is well-defined and is supported by procedures and practices at the district and school levels (see Curriculum and Instruction standard for detail on academic interventions). | | How well does this indicator describe  your district’s current practices?  Put an X in the box that represents your rating | | | |
| --- | --- | --- | --- | --- | --- |
| Not at all well | Somewhat well | Well | Very well |
| 1. MTSS System | The district implements an MTSS system aligned to the MTSS Blueprint that proactively identifies and meets students’ academic, behavioral, and social emotional strengths and needs. |  |  |  |  |
| 1. MTSS Structure | The district clearly defines the systems’ three tiers of support. |  |  |  |  |
| Please explain the reasons for your responses above in a few sentences (the table will expand as you enter your answer). If there are documents or data that illustrate your responses, please feel free to list and submit them along with this self-assessment. | | | | | |

## Standard 6: Financial and Asset Management

Through its policies, systems, and procedures, the district strategically allocates and utilizes funding and other resources in alignment with applicable laws to improve all students’ performance, opportunities, and outcomes. The district collaborates with its partners to run daily operations, manage its assets, and develop long-term plans for sustainability.

| **Indicator 1****: Business Office Staffing and Infrastructure**  The district, in cooperation with its municipal partners, where applicable, effectively runs daily business operations and maintains financial records in alignment with applicable law. | | How well does this indicator describe  your district’s current practices?  Put an X in the box that represents your rating | | | |
| --- | --- | --- | --- | --- | --- |
| Not at all well | Somewhat well | Well | Very well |
| 1. Business Office Staffing | The business office has a sufficient level of qualified and appropriately licensed or credentialed staff to support daily operations and annual planning. |  |  |  |  |
| 1. Written Policies and Procedures | The business office has comprehensive written policies and procedures that outline ongoing work, ensure compliance with state and federal requirements, establish an internal system of checks and balances, and provide continuity to operations when staffing disruptions arise. |  |  |  |  |
| 1. Financial Management System | The district utilizes an efficient, comprehensive, and secure financial management system for monitoring and controlling resources and follows the Uniform Massachusetts Accounting System (UMAS). |  |  |  |  |
| 1. Records Management | In alignment with the Massachusetts Statewide Records Retention Schedule, the district has an efficient system for preserving, categorizing, and, when permissible, destroying financial documents, including (but not limited to) procurement records, invoices, purchase orders, and receipts. |  |  |  |  |
| 1. Municipal Relations | The district and municipality have a strong working relationship in which roles and responsibilities are clearly defined. |  |  |  |  |
| Please explain the reasons for your responses above in a few sentences (the table will expand as you enter your answer). If there are documents or data that illustrate your responses, please feel free to list and submit them along with this self-assessment. | | | | | |

## Standard 6: Financial and Asset Management (cont.)

| **Indicator 2:** **Budgeting and Budget Process**  The district equitably distributes its resources through a strategic budgeting process and develops multi-year projections to anticipate future staffing and student needs. | | How well does this indicator describe  your district’s current practices?  Put an X in the box that represents your rating | | | |
| --- | --- | --- | --- | --- | --- |
| Not at all well | Somewhat well | Well | Very well |
| 1. Equitable Distribution of Funds | The district’s budget equitably funds schools and departments by providing adequate resources, based on regularly conducted needs assessments, to meet the needs of all students with particular attention to historically underserved populations. |  |  |  |  |
| 1. Budget Development and Approval | The district regularly engages in a transparent budgeting process that is aligned with the district strategic plan and incorporates input from district administrators, school leaders, school councils, teachers, policymakers, and the community. |  |  |  |  |
| 1. Grants Management and Strategy | The district responsibly manages and strategically applies for state and federal grants that are aligned with the district’s strategic plan. |  |  |  |  |
| 1. Financial Planning | The district has a current multi-year financial plan that incorporates projected enrollment and required staffing, cost-of-living adjustments set in its collective bargaining agreements, and anticipated increases in its service contracts. |  |  |  |  |
| 1. Spending and Controls | The district has policies and procedures in place so that funds are regularly monitored and spent in accordance with requirements. |  |  |  |  |
| Please explain the reasons for your responses above in a few sentences (the table will expand as you enter your answer). If there are documents or data that illustrate your responses, please feel free to list and submit them along with this self-assessment. | | | | | |

## Standard 6: Financial and Asset Management (cont.)

| **Indicator 3****: Operations**  The district maintains regular operations for its schools, including enrollment and assignment, building and grounds, school safety, transportation, nutrition, and technology. | | How well does this indicator describe  your district’s current practices?  Put an X in the box that represents your rating | | | |
| --- | --- | --- | --- | --- | --- |
| Not at all well | Somewhat well | Well | Very well |
| 1. Enrollment and Assignment | The district leverages its enrollment and assignment policies to provide all students with equitable access to high-quality learning environments and opportunities. |  |  |  |  |
| 1. Buildings and Grounds | The district (in partnership with the municipality, where applicable) maintains its buildings and grounds and provides for accessible, clean, safe, secure, well‐lit, and well‐maintained facilities that are conducive to student learning. |  |  |  |  |
| 1. Transportation | As required by law, the district provides reliable transportation services, either on its own or through a vendor, so that students can safely get to and from school on time. |  |  |  |  |
| 1. Nutrition | The district offers its students nutritious, healthy breakfasts and lunches at no charge to families. |  |  |  |  |
| 1. Technology | The district provides its students and staff with the hardware, software, and related licenses and support for everyday learning and daily operations. |  |  |  |  |
| 1. Procurement and Contracting | The district purchases supplies and services in alignment with state laws and effectively manages those contracts with vendors. |  |  |  |  |
| Please explain the reasons for your responses above in a few sentences (the table will expand as you enter your answer). If there are documents or data that illustrate your responses, please feel free to list and submit them along with this self-assessment. | | | | | |

## Standard 6: Financial and Asset Management (cont.)

| **Indicator 4:** **Managing Capital Assets and Capital Planning**  The district has a system for tracking its assets, maintains and replaces them on a regular cycle, and has a sustainable long-term capital plan given building conditions and shifting enrollment. | | How well does this indicator describe  your district’s current practices?  Put an X in the box that represents your rating | | | |
| --- | --- | --- | --- | --- | --- |
| Not at all well | Somewhat well | Well | Very well |
| 1. Asset Tracking. Maintenance, Replacement, and Disposal | The district manages and tracks its inventory of capital assets and critical supplies through a catalog or other efficient system. |  |  |  |  |
| 1. Capital Planning | The district has a current long-term capital plan that describes future capital needs, is based upon future enrollment projections and facility assessments, and incorporates input from district and community stakeholders. |  |  |  |  |
| Please explain the reasons for your responses above in a few sentences (the table will expand as you enter your answer). If there are documents or data that illustrate your responses, please feel free to list and submit them along with this self-assessment. | | | | | |