

## Policy 0300: Reporting and Progress Monitoring

### Overview of Progress Monitoring

The Board directs the Superintendent to conduct regular progress monitoring of all goals and commitments. The Board further directs the Superintendent to provide periodic updates of this progress monitoring to our community and the Board to facilitate transparency, accountability, and understanding of the work of the District in fulfilling its mission (policy 0100), vision (policy 0110), values (policy 0120), and its commitments to equity and accountability (policy 0130). Progress updates shall be provided for the following:

- A. Strategic plan goals (policy 0150);
- B. Other long-term plan goals (policy 0150)
- C. Equity and accountability commitments (policy 0130 and policy 0150);
- D. Annual plan goals (policy 0150) – including both Tier 1 and Tier 2 goals
- E. School Improvement Plan Goals (policies 0150 and 2005)

This process is part of the broader work of the Superintendent to ensure that the District monitors the effectiveness, outcomes, and impacts for all students from its curricula, programs, departments, initiatives, and overall work. Both the impacts of individual initiatives and programs on students, and the overall experience of students should remain in focus when monitoring and considering data about particular programs. Board Directors shall strive to make policy decisions based on information received in these reports that reflects the progress or the need for improvement toward these various goals and with consideration of the overall best interests (with respect to advancing our mission, vision, values, and commitments to equity and accountability) of each and every student in the District.

Regular progress updates will increase transparency, better enable effective collaboration, and help reinforce shared expectations among Superintendent, Board, educators/staff, students, families, partners, and community members. Formal progress reporting should occur on an annual basis for long-term plans and on a more frequent basis for short-term plans. Additional progress updates may be provided at more frequent intervals. All progress reports should unambiguously assess progress towards the agreed goals/target measures using current outcome-based measures or interim measures. Formative progress reports should identify whether progress is on track, at risk but with a defensible plan to get back on path, or off track. Summative progress reports should identify whether goals were met, partially met (significant progress towards goal or significant subset of goals met), or not met. Status should also be provided for any equity-based risk monitoring criteria.

In formal reports, goal progress should be presented in concert with reflections about strategies and resources, fidelity of implementation achieved, risk mitigation strategies, stakeholder feedback about experiences and results, and other relevant data and implementation details. Next steps should be identified based on these reflections. If status for a goal is off track, the Superintendent should provide an update to the Board by an agreed upon date. If the Board finds

any critical information or evaluation missing from reports, it may request that the Superintendent provide an update to the Board by an agreed upon date.

Additional progress reports may be required by law, requested by the Board, or recommended by the Superintendent. Such reports may be constructed based on different criteria as specified by legal requirements and/or as agreed upon by the Board and Superintendent.

The Superintendent will develop a procedure to support progress monitoring and reporting. This procedure should include a plan for public posting of regular progress monitoring updates, a common report template or set of templates and/or report guidelines to be used consistently for formal progress monitoring reports created by the Superintendent and district staff, templates for other related reports (such as school visit reports) as needed, and a clear process for the district to ensure that progress updates and reports to the Board and community are accurate, complete, and fully comply with relevant policies, especially this policy (0300), . Per policy 0200, the Board will approve this procedure and any updates to it.

### **Regular Progress Monitoring Updates**

To promote focus on the district goals and commitments, and to facilitate our value of collaboration by keeping all stakeholders informed, the Superintendent shall ensure that progress towards all goals and commitments is posted on the district website regularly according to the following frequency and schedule.

- **Long-term plan goals** (per Policy 0150; e.g. strategic goals, growth and planning goals): Annually (within one week of the date for the required corresponding formal progress report)
- **Short-term plan goals** (per Policy 0150; e.g., annual plan tier 1 and tier 2 goals, SIP goals, equity and accountability commitments' annual measures): Three times during the school year, including:
  - two formative progress updates
    - one before winter break and no later than December 31<sup>st</sup>
    - one before spring break and no later than April 15<sup>th</sup>
  - one summative progress update (within one week of the date for the required corresponding formal summative progress report)

Progress monitoring updates on goals should be accessible not only on any district-wide web page dedicated to progress reporting data, but also (directly or via a link) from the most relevant program, department, or school webpages associated with the goals and plans.

Regular progress monitoring updates should include, at a minimum, the following elements:

- the goal(s) being addressed in the update
- the target measures being used to assess the goal(s)
- the actual current [interim] measure being used to evaluate progress for this update
- the current status of progress to goal (see status descriptions in formal progress monitoring report content section below)

- optional, but encouraged
  - for off track/goal not met rating: information about what caused status to be off track/not met
  - for at risk/goal partially met rating: information about what caused status to be off track/not fully met, and for off track status, information about the path back to on track

The Superintendent or designee shall provide notification to the Board when regular progress monitoring updates are posted. The Superintendent shall provide confirmation to the Board at the first regular Board meetings of the month in September, January, and May that all required progress monitoring updates have been posted.

In the event of a significant extended disruption to schooling overall, or to particular programs, or in other rare circumstances, the Board may direct the Superintendent, or the Superintendent may recommend, to provide more frequent progress updates for a particular plan or set of goals. In such circumstances, the Superintendent, in consultation with the board, shall make a recommendation about which goals to include, how often to provide updates, and in which form. The Board should provide feedback and approve a plan.

### **Formal Progress Monitoring Report Content**

To promote focus on the district's goals, provide transparency for all stakeholders, and support the Board's oversight role, all Superintendent or staff reports to the Board, written and/or oral, shall:

- Be approved by the Superintendent or designee prior to submission to the Board. (The superintendent's approval should be noted by date on the cover page of the report or in another conspicuous location.)
- Be submitted according to the timeline requirements specified in this policy.
- Be published to website so they are readily discoverable, accessible, and consumable by stakeholders.

The reports should contain, at a minimum, the following:

#### **Goals**

The report should be organized around District strategic and annual goals and the corresponding pre-identified measurable outcomes. Specifically, the report should clearly identify:

- the goal(s) being addressed in the report,
- outcome-based target measure for each goal
- current actual outcome-based measure for each goal/target, or, if unavailable at time of progress report, the actual outcome-based interim measure being used to evaluate whether the goal is on track during the course of the implementation

- the timeline for monitoring and assessment of these particular goals,
- risk mitigation criteria identified in the associated plan from the critical criteria review and current measures of those criteria
- whether the goal was considered a “stretch goal” (i.e., a goal that is deliberately challenging or ambitious), and
- how these goals support the District’s strategic or annual goals, the District’s commitment to equity and accountability, and/or the District’s advancement of its values.

**Status of Goal Progress**

Specify current status to unambiguously indicate progress on the goals based on the following category/color assignment:

<b>Formative Status</b> <i>during course of plan implementation period</i>		<b>Summative Status</b> <i>at end of plan implementation period</i>	
<b>On-Track</b> <i>light green</i>	Outcomes-based [interim] measures indicate progress is on track to meet goal without any significant change or new resources and there are no known road-blocks that are likely to compromise progress	<b>Goal Met</b> <i>green</i>	Target outcome(s) achieved (or exceeded)
<b>At Risk</b> <i>light yellow</i>	Outcomes-based [interim] measures indicate progress is not on track and/or a road-block has been identified that is expected to take progress off track, but a high confidence plan is in place to get back on track	<b>Goal Partially Met</b> <i>yellow</i>	Significant subset of target outcomes was achieved or significant measured progress was made toward target outcome(s) though target(s) were not fully met
<b>Off Track</b> <i>light red</i>	Outcomes-based [interim] measures indicate progress is not on track or a road-block has been identified that is expected to take progress off track, and there is not yet a high confidence plan in place to get back on track	<b>Goal Not Met</b> <i>red</i>	Target outcome(s) were not met

Additionally, identify the status of risk mitigation monitoring criteria using the same status ratings.

### **Rationale for Status Ratings**

Explain how goal status ratings were determined.

- Focus on the target measures and comparison to current [interim] measures.
- Provide any descriptive examples that help illustrate the status and the experiences and strategies related to it
- Identify any roadblocks.
- For any at risk (light yellow) ratings, indicate:
  - what caused the goal to be off track
  - what the plan is to get back on track
  - what evidence and reasoning provide confidence that the plan will put the goal back on track
- For any goal partially met (yellow) ratings, indicate
  - what caused the goal to be off track
  - why the progress made qualifies as significant
- For any off track (light red) ratings, indicate:
  - what caused the goal to become off track
  - what issues must be addressed to find a path back on track
- For any goal not met (red) ratings, indicate what caused the goal to be not met

Ensure that measures are specified at appropriate levels of aggregation and disaggregation to evaluate progress on the entire goal and to evaluate our equity and accountability commitments and targets.

For any goals with risk mitigation monitoring criteria that are not met (green) or on track (light green), indicate what is thought to have caused the negative impact. Indicate how that negative impact will be addressed and what evidence we have that gives confidence that planned approach will address the negative impact.

### **Findings and Reflections and Next Steps**

Reflect on what the data indicate about progress, effective strategies, additional concerns, and next steps. Where possible, make connections to the following data:

- Outcome-based measures and outcome-based interim measures
- Equity-focused risk monitoring criteria
- Fidelity of implementation measures
- Stakeholder (e.g., student, educator/staff, family, partner, community member) feedback about the experience and/or results (acknowledge when qualitative data was collected systematically vs. more opportunistically)

- Additional contextual details (e.g., other strategies, circumstances, and constraints at play – acknowledge when contextual data is broadly applicable vs. applies to only a subset of relevant circumstances)
- Other relevant data – qualitative or quantitative

Specifically, reflections should address the following:

- Are we getting the results we expected to see?
- What strategies and supports did we put in place to get those outcomes?
  - Who are those strategies and supports benefiting? How do we know?
  - Who are those strategies and supports marginalizing? How do we know?
- What should we celebrate?
  - Specifically, what should we acknowledge, codify, and potentially spread in terms of demonstrated effective targets, strategies and supports, resources, execution approaches, and risk mitigation strategies and measures?
- Do we need to make any changes to achieve our outcomes?
  - Specifically, what strategies, supports, resources, risk mitigations, contextual elements, or other factors should be adjusted and how? How does the data support these conclusions?
  - In rare cases, is the target measure as effective as needed to drive the goal result or does it need to be adjusted?
- If this is a summative report, is additional work needed?
  - To meet the initial goal/target?
  - To address any negative impacts?
  - To make further progress towards a longer-term goal?
  - To ensure positive results are retained?
  - For other reasons?

### **Next Steps**

- Identify for the Board any significant next steps that the District will be taking to address goal progress and attainment, including:
  - Changes in resources
  - Changes in strategies
  - Changes in data collection
  - Other key changes that will help the Board to understand the work, the needs, impacts on students and staff, implications for policy development, and progress towards goals
- If any goal presented in the report is rated as off track (light red), and the report is not a summative report covering the overall strategic or annual plans, the report must present a timeline for reporting back to the Board about progress on these goals. This

report must be presented in writing and may or may not be discussed during a Board meeting (see below regarding Board follow up action).

- Identify any of the following that you would like to recommend to and/or request of the Board in support of goal progress and attainment. Note that anything presented in this section will require Board approval to proceed.
  - Potential policy revisions (and timeline).
  - Needed additional resources that are not within the District's current budget/plan and that would require Board approval (including timeline).
  - Measurement adjustments to what was approved in strategic or annual plans
  - Timeline adjustments to what was approved in strategic or annual plans, or Board reporting calendar
  - Goal adjustments to what was reported in strategic or annual plans
  - Other requests or recommendations, as appropriate

### **Organization and Formatting**

- Format reports to ensure the following:
  - Make the language plain and understandable to non-educators. If acronyms or education-specific terms are used, they should be defined in the report (at first use where possible and in a list of key terms and acronyms where appropriate).
  - Label all axes, tables, graphs, figures, and data clearly.
  - Make graphical data clear and understandable such that it cannot be misunderstood. When possible, include data in tables and reports. Clarify when comparative data are based on past years/classes verses based on cohort growth.
  - Include the date on which the report was finalized.
    - If the report is a subsequent version of a previously provided report, it should indicate so, and include both the date of the previous version and its own date.  
If the report is a follow up to a previous report, it should indicate so, specifying both the report it is in follow up of, and its own finalized date.

### **Formal Progress Reporting Frequency and Timeline**

Formal progress monitoring reports to the Board should adhere to the following timelines and according to the dates specified in the relevant planning documents:

#### **Strategic Plan goals**

- One formal progress monitoring report should be provided each year by December following the school year for which the data were collected. The report should assess progress on each Strategic Plan goal. The report will be considered a formative report in all years except the final year of the plan, when it will be considered a summative report.

**Other Long-term Plan goals**

- One formal progress monitoring report should be provided each year by December following the school year for which the data were collected. The report should assess progress on each long-term plan goal. The report will be considered a formative report in all years except the final year of the plan, when it will be considered a summative report. These long-term plan reports should be presented together with the strategic plan reports.

**Annual Plan goals (Tier 1 & Tier 2)**

- At least two formal formative progress monitoring reports for each Tier 1 annual plan goal should be provided from September- May.
- At least one formal formative progress monitoring report for each Tier 2 annual plan program goal should be provided August – May.
- One formal summative progress monitoring report should be provided in May/June of each school year. This report should address the final outcome and status for each annual plan goal (both Tier 1 and Tier 2 goals).

**Annual School-Specific Goals**

- One formal summative progress monitoring report per school should be provided each year by the end of September to assess progress on each SIP goal for the preceding school year.
  - These reports shall be submitted to the Board as written only reports.
- Three to four aggregated summaries of the formal written school-specific reports will be presented and discussed with the Board in October, November, and possibly December, of each school year. Numbers may be presented in appropriate groupings (e.g., elementary, middle, high; or based on feeder patterns; or other groupings as appropriate to provide the most accurate and productive understanding of student outcomes and experiences, and school experiences and needs that relate to student outcomes and goal progress). The Superintendent will consult with the Board to determine appropriate groupings.
  - By default, the groupings will be: high schools, middle schools, and elementary schools.

- Choice secondary schools that include grades six through twelve will be included in both the high school and middle school reports.
- The elementary school aggregation may be organized into two reports, each representing a subset of elementary schools or each focusing on a different subset of the goals.
- These summary reports will be organized around the district's strategic and annual goals and will use schools as the unit of measure, rather than individual students, though supplemental data on students may be provided as appropriate, to offer greater context for understanding the progress.

### **Equity and accountability commitments and annual goals/target measures**

- One formal annual progress-monitoring report for District's commitments to equity and accountability target measures must be presented by the end of June and must be in compliance with both the requirements of this policy and of the Equity and Accountability policy (0130). This report may be tied to the annual plan formal summative progress monitoring report but must include goal/target measure status rating for each goal. This annual equity and accountability progress monitoring report will include additional reporting requirements as specified in Policy 0130 and Procedure 0130P.

As part of the establishment of the Annual Board Governance Calendar and in creation of relevant planning documents, the Superintendent will work with the Board to provide a timeline for reporting on specific annual (Tier 1 & Tier 2) goals and aggregate school-based reports., and the specific dates for each of the described progress-monitoring reports. Timelines for establishing and updating strategic and annual plans and goals, as set in policy 0150, should be followed as delays in that process may impact reporting. From time to time, the Board and/or Superintendent may initiate an additional report to the Board, as needed, to address an emerging issue, a change in plan, or a deeper tracking of something already being reported to the Board.

Each individual report should be prepared and submitted with sufficient time for the following report review and approval process:

- Step 1.** District staff complete the report using the prescribed report template and submits to the Superintendent or designee.
- Step 2.** Superintendent reviews and approves the report.
- Step 3.** Board Directors receive the report at least 8 business days prior to the board meeting.
- Step 4.** Board directors review the report and submit related questions and requests for additional information to the Superintendent at least 3 business days prior to the Board meeting. Board Directors may provide additional questions/feedback and

request additional information at the meeting as appropriate but should endeavor to present the majority of their initial concerns prior to the Board meeting.

**Step 5.** If revisions are made to the report, the Superintendent or designee must approve the revised report prior to distribution to the Board.

### **Board Actions Regarding Reports to the Board**

For all reports submitted to the Board, whether in the consent agenda in writing only, or presented in writing and discussed during a Board meeting, the Board must vote on whether to accept the report as fulfilling the given monitoring and reporting requirement established for that goal. Note that acceptance of the report does not indicate approval of any requests or recommendations to the Board presented within the report, nor does it indicate the Board's approval of the progress on the work itself. Specifically, the Board should consider the following options:

- A. The Board accepts the report as presented.
- B. The Board accepts the report as presented and requests some additional information be provided at a future time or in a later planned report.
- C. The Board requires additional information be presented and delays accepting the report until additional information is provided and accepted by the Board.

If a report is presented only in the consent agenda, and is not presented separately for further discussion, Board passing of the consent agenda will imply that the Board accepts any reports contained within it. Any reports explicitly removed from the consent agenda or also included on the Board agenda for additional presentation/discussion will not be considered accepted by the Board as part of the consent agenda approval.

In addition, once a report is submitted to the Board, the following actions may ensue:

- i. **Request Compliance with Reporting and Monitoring Requirements.** Prior to the Board meeting, if a Board Director finds that any of the reporting requirements are not met in a given report, that Board Director should inform the Board President of their concerns. The Board President should communicate any such concerns to the Superintendent. The Board President and Superintendent should attempt to come to consensus on any revisions needed for the item to be included at the upcoming Board meeting. If the Board President or Superintendent believe that adequate revisions have not been completed in a timely fashion, the Report should be removed from the meeting agenda. If, at the start of a Board meeting, a Board Director is concerned that a report does not meet the reporting requirements, during the approval of the agenda at the relevant Board meeting, a Board Director may propose that a report be removed from the agenda for that meeting and only brought back when all reporting requirements are meant. The Board may then choose to remove that report from the agenda or to proceed with the report on the agenda as planned (which may or may not result in Board acceptance of the report).
- ii. **Remove from Consent Agenda.** If a Board Director would like further discussion and/or a separate vote to consider acceptance of a report in the consent agenda, the Board Director

should request to have that item removed from the consent agenda for separate consideration. Such a request may be made prior to a Board meeting, or at the agenda approval or consent agenda portions of the Board meeting. When possible, as described in section a above, Board Directors should raise their concerns about reports to the Board President prior to the relevant Board meeting.

- iii. **Ask Clarifying Questions.** The Board may ask questions of clarification of the Superintendent and/or his designated staff members to better understand the content of the report, and most importantly, the impact of the work on students, staff, families, District culture, and desired outcomes. When possible, Board Directors should submit clarifying questions to the Superintendent prior to the Board meeting. Additional time during the Board meeting may or may not be available for clarifying questions during that item's time on the agenda.
- iv. **Provide Feedback to the Superintendent.** The Board may express, to the Superintendent, their individual satisfactions, concerns, and/or feedback about the work in the report. All feedback provided by individual Board Directors may be considered by the Superintendent and the staff based on its merits. However, such feedback is not considered direction from the Board unless otherwise explicitly indicated, formally or informally, during the discussion. Such feedback may be provided to the Superintendent prior to or following the Board meeting, and sometimes, time allowing, during the discussion of that agenda item during the Board meeting.
- v. **Request Additional Information.** The Board may request additional data or information from the Superintendent to be in compliance with reporting requirements, to provide greater clarity and/or transparency, to help inform related Board decisions, and/or to support the role of the Board. Such requests should be made in consultation with the Superintendent and should not unreasonably detract from the execution of the work to support students. The Superintendent should make clear to the Board the implications of their request if such requests will require significant time, effort, or expense to the District so that the Board can prioritize its requests accordingly. When possible, such requests should be made of the Superintendent by Board Directors prior to Board meeting. Additional time during the Board meeting may or may not be available for clarifying questions during that item's time on the agenda.
- vi. **Discuss Open Issues with Board Directors and Superintendent.** Time allowing, if Board Directors have concerns related to accepting a report or related to next steps from a report, Board members may discuss further with each other and with the Superintendent, in compliance with the Open Public Meetings Act. Primarily, such discussions will take place during Board meetings in open public session as appropriate.
- vii. **Establish a Follow-up Timeline.** If the Board does not accept a particular report, or if the progress rating for any goal in a report (except the final summary reports for the annual or strategic goals) was RED, the Board, or the Board President on behalf of the Board, should consult with Superintendent to determine a timeline for an updated report. They should also agree on whether the follow up report will be written only (and included in consent agenda) or will be written and will be discussed during a future Board meeting.

The Board should also establish a follow up timeline with the superintendent for receiving any additional follow up data or information. Generally, such timelines will be discussed and determined during Board meetings. However, when the Board President and Superintendent are aware of follow up needs prior to the Board meeting, they should consult with each other to agree on a timeline to propose at the Board meeting.

### **Additional Reporting Requirements**

In addition to the reporting above, the District will:

- Ensure that formal progress monitoring reports shared with the Board are made available on the District website in a way that community members may reasonably locate and access.
- Report annually in a news release to the local media the district's progress toward meeting strategic and annual goals.

### **Additional Reports**

It is not uncommon for the District to present to the Board a variety of reports that are required by state statute and/or that support transparency and accountability for District operations, but that do not directly monitor progress in the district toward Strategic goals or Annual Plan goals. Reports of this type (e.g. field trips, construction progress or change orders, budget updates, etc.) should generally be included as a Consent Agenda item. Occasionally, if these reports contain areas that require a formal presentation or further discussion, Board Directors or the Superintendent can request that those reports or sections of the report be moved to the Action or Discussion Items portion of the Board meeting. At least once in the first two months of the school year, the Superintendent will provide the Board with a demographics and enrollment report.

**Legally Required Reports.** Note that state, federal, and other legally and contractually (e.g., for grants) required reports not listed under items A-D in the above list of reports, and as noted in policy 0140, should first comply with any relevant mandated reporting requirements, and should then address relevant aspects of reporting from this policy, as determined appropriate by the Superintendent, in consultation with the Board.

The Superintendent will enumerate and maintain a list of all legally required reports, and any timeline requirements.

**School Visit Reports.** When the School Board conducts a formal school visit, the Superintendent or designee shall provide the school's annual formal summative progress monitoring report for the past school year and the school's most current progress update for the current school year (and the current SIP on which it is based). Both of these are described above. Additionally, the Board will ask the Superintendent or designee to provide an informal summary of the following: notable school successes and celebrations, especially those connected to outcomes, student experiences, equity, and family engagement; current school challenges, including challenges with equity; the foci for the year of the building leadership team, the equity

and inclusion team, and any professional learning communities at the school; key strategies at play and both successes and challenges with fidelity of implementations; any important information that helps the board understand the school community and context,

**Other District Reports.** Occasionally, the Board may request an additional report of the Superintendent, which it should do in consultation with the Superintendent in the context of other reports and District priorities. The Superintendent may also choose to issue additional reports to help provide important information to the Board.

**Board Committee Reports.** Additionally, formal Board committee progress reports (mid-year, and end-of-year, as described in Procedure 1240P) should generally conform to the reporting approach outlined in this document. Such Board committee reports, however, do not need to be approved by the Superintendent or follow the District procedure, but rather should be approved by the Board per Policy 1240 and Procedure 1240P.

Cross References:

Board Policy 0100	Mission
Board Policy 0110	Vision
Board Policy 0120	Values
Board Policy 0130	Equity and Accountability
Procedure 0130P	Equity and Accountability
Board Policy 0140	Legally Required Goals
Board Policy 0150	Planning Process
Board Policy 0200	Policy Adoption, Manuals and Administrative Procedures

Legal References

RCW 28A.655.100	Performance goals – Reporting requirements
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**Adoption Date: 4.2.13**

**Bellevue School District**

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