**Charter Network Accelerator Organizational Effectiveness: Self-Assessment Network:**

**Context:** This framework aims to provide you with a defined set of criteria for an effective organizational foundation that will support a network in scaling with quality. We do not imagine you have all of these criteria right now, nor should you work to improve or build them all in one year. We believe it is helpful, though, for you to see the whole – the organizational design and practices that the highest-performing charter networks take on to build their models – and to self-assess against it to see where you currently are. We will continue to improve this Organizational Model as we learn from your networks and from other successful networks around the country.

**Snapshot of Organizational Model and Effectiveness:**

* Personal Leadership *(Not assessed here)*
* Senior Leadership Team Effectiveness *(Not assessed here)*
* Long-Term Strategic Planning
  + Theory of Action to Reach Mission
  + Goals, Priorities and Annual Planning
  + Expansion Planning
* Organizational Culture and Core Values
* Decision Making Processes
* Internal Communication
* Talent Strategy and Practices
  + Recruitment
  + Compensation
  + Talent Development and Career Paths
* Knowledge Management

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**Directions for Completing:**  Between December 5th and January 6th, network leadership teams meet and assess their network against the success criteria in the Organizational Model, capture short notes on rationale for their ratings and/or include data or links to documents, and share current level of priority on improving each aspect. Feel free to look at sample artifacts aligned to this model at <http://www.achievementfirst.org/opensource/organizational-effectiveness/>. **Send this reflection to Sara Keenan by January 6th.**

When rating, a 1 means you don’t have this criteria at all. A 3 means you have it, but it lacks impact, clarity, or quality implementation. A 5 means you have this criteria, and it is implemented as a strong driver of organizational effectiveness.

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| **Aspects of Model** | **Success Criteria** | **Rating from 1 - 5** (1 – low; 5 – high. See above for detail) | **Short Rationale for Rating** | **What Level of Priority Do You See in Improving This?** |
| **Long-Term Strategic Planning** | Clear theory of action (or high-level strategy) for how the organization will achieve its mission |  |  |  |
| A limited number of priorities (3-5) guide the organization’s focus and work |  |  |  |
| Strong performance management with annual goals for schools, network teams and individuals |  |  |  |
| Review progress against goals several times per year in an agreed-upon process |  |  |  |
| Annual priority planning is aligned with budget and staffing process |  |  |  |
| Expansion plan agreed to through a strategic planning process and reviewed annually |  |  |  |
| “Greenlighting” criteria for growth, which include financial feasibility, availability of facilities and readiness of a school leader |  |  |  |
| Expansion in planned in one region or in regional clusters |  |  |  |
| **Organizational Culture and Core Values** | A limited number of core values (4-6) that guide the organization and *how* people go about their work |  |  |  |
| A very high bar for core values and culture fit when hiring |  |  |  |
| Intensive onboarding acclimates and invests new staff in organizational values and expectations |  |  |  |
| Core values are powerfully present at network and school events, shaping organizational culture |  |  |  |
| Annual staff survey on organizational climate and staff engagement (or more frequently) |  |  |  |
| Feedback loop to ensure staff are confident their feedback has been heard |  |  |  |
| Senior leaders spend significant time reinforcing core values and culture with staff |  |  |  |
| **Decision Making Processes** | Outline of what decisions are made at the network level and what decisions school leaders can make |  |  |  |
| Outline of what services the network provides versus what the schools are responsible for providing |  |  |  |
| Clear process for network decision-making that engages a diverse group of stakeholders |  |  |  |
| Common language for assigning responsibilities and decision-maker on projects *(ex: MOCHA – Manager, Owner, Consulter, Helper, Approver)* |  |  |  |
| **Internal Communication** | Systems to ensure open communication within the home office *(weekly memo; teams cascade messages from leadership team; monthly network team meetings)* |  |  |  |
| Systems to ensure open communication between home office and schools (weekly memo; principals cascade messages from meetings; quarterly whole network meetings) |  |  |  |
| **Talent Strategy and Practices** | Talent strategy and goals that align with the network’s theory of action and expansion plans |  |  |  |
| Systems that accurately track key talent data *(staff retention, staff engagement/satisfaction, staff diversity, etc)* |  |  |  |
| Clear compensation strategy and aligned salary expectations across schools and network |  |  |  |
| Recruitment strategy and selection processes support hiring of talented staff who are likely to be successful in organization |  |  |  |
| Process for identifying high-potential future leaders and supports for investing in their development |  |  |  |
| Promotion practices are transparent and support internal leader development |  |  |  |
| Clear expectations and supports for succession planning for senior roles |  |  |  |
| **Knowledge Management** | System to support the sharing and codification of key aspects of the network’s model |  |  |  |
| Clear expectations and training for knowledge management practices |  |  |  |