

Building a Student-Centered School Portfolio Strategy

PHASE 1: READINESS & VISIONING

ASSESS READINESS & BUILD PLAN

- **Project the magnitude of potential change** using enrollment data
- **Explore using board policy** to center portfolio reviews on student & educator experiences
- **Understand the district's readiness** for change
- **Build a project plan** & engagement strategy with timelines
- *Don't abdicate leadership responsibility (inclusive of the leadership team)*

START WITH A VISION FOR STUDENT & EDUCATOR EXPERIENCES

- **Articulate the vision** for student & educator experience
- **Understand current state pain points** from students, educators, and community (e.g. consider the impact of current grade sizes on student & educator experiences)
- *Don't center the 'why' on cost-savings*

DEVELOP CRITERIA FOR EVALUATING PORTFOLIO OPTIONS

- **Co-create guiding principles** (with variety of stakeholders) for student & educator experiences that will inform portfolio options
- **Make connections** to the strategic plan
- **Iterate on and finalize the criteria** for portfolio options with stakeholders
- *Don't over-promise on what portfolio changes can deliver*



PHASE 2: EXPLORING & TESTING OPTIONS

EXPLORE A BROAD SET OF PORTFOLIO LEVERS

- **Build a comprehensive database** to align on current state and potential options
- **Align portfolio levers** with the vision for student and educator experiences
- *Don't ignore the impact of prior portfolio changes on historically marginalized communities*

TEST & EVALUATE PORTFOLIO OPTIONS

- **Evaluate options** using principles from student and educator experiences
- **Present options & scenarios to community** and build in feedback loops so stakeholders can evaluate these relative to established criteria
- *Don't overlook the capacity required to deliver on (relatively) big changes*



PHASE 3: IMPLEMENTING & INSTITUTIONALIZING

DEVELOP AN IMPLEMENTATION & TRANSITION PLAN

- **Establish an implementation plan, transition plan, and change leader** for each affected school
- **Identify "must-haves"** for building shared community and identity
- Align and communicate **implementation timeline**
- *Don't underestimate the time, support, and resources needed for all impacted stakeholders*

INSTITUTIONALIZE THE CHANGE & MONITOR PROGRESS

- **Track leading indicators** of intended student outcomes
- **Reflect on lessons learned** for future portfolio redesign
- **Demonstrate responsiveness** to feedback
- **Follow through on** student experience and optimization objectives
- *Don't neglect to share progress to broader school community consistently (e.g., best practices, lessons learned, future considerations)*