

# ORGANIZATIONAL ASSESSMENT FOR SUSTAINED IMPROVEMENT IN EDUCATION

APOC Education Services

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*With insights from:*  
*Clarksville-Montgomery County School District, Tennessee*  
*Salem-Keizer Public Schools, Oregon*

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Just as an annual review helps employees understand what they're doing well and what they could be doing better, school districts need an annual assessment of the key operational aspects that lead to student achievement.

APQC's [Organizational Assessment \(OA\)](#) service takes stock of a district's performance from a systems perspective, using interviews, observation, document review, and in-depth analysis. In addition to pinpointing strengths and opportunities for improvement, APQC's week-long process gives the school district a rigorous, objective view of all the core components of an effective system including:

- ◆ Leadership
- ◆ Strategic planning
- ◆ Curriculum and teaching
- ◆ Stakeholder engagement
- ◆ Stellar people
- ◆ Effective and efficient processes
- ◆ Accountability

*Organizational assessments provide a road map to find where problems exist, which allows districts to solve problems they may not have known existed. They also build credibility by modeling that district leadership is open to suggestions and continuous improvement.*

The process culminates in a meeting with district leaders, where they can gain feedback, compare the findings to their own perceptions of performance, evaluate the sustainability of current initiatives, outline next steps for improvement, and incorporate the findings into the strategic plan.

Co-developed by APQC's Vice President for Education [Mardi Krenek](#) over the course of her career in supporting districts across the country, the APQC process is designed to help school districts become more efficient and effective organizations, while supporting all students in achieving excellence.

"The organizational assessment process provides you a metric for looking at yourself on a continuous improvement cycle over time, and it brings in a variety of people inside and outside your district who are interested in telling you what things are broken," says Sandy Husk, Chief Executive Officer at AVID, a non-profit that provides professional development support for educators.

"At the same time, the OA validates the fact that you're open to suggestions on how to get better, so you can role model from the top of the organization that we only get better when we are open to feedback. That is a good cultural message."

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## ORGANIZATIONAL ASSESSMENT IN ACTION

When Clarksville-Montgomery County School District in Tennessee was selected by the Stupski Foundation to receive support for districtwide reform – a process that included an organizational assessment led by Krenek – Husk was superintendent at the district.

“We discovered that 99 percent of all staff – from custodians to bus drivers to teachers – could tell you how their work supported student achievement. The understanding and ability to articulate their value at all levels was a huge accomplishment,” she says.

By repeating the OA process annually, the district was able to identify opportunities and make improvements that stood the test of time.

“The organizational assessment was a good way to get a handle on where we were as a district, with all the different components,” Husk says. It was such a phenomenal help, she says, when she moved to a new job as superintendent of Salem-Keizer Public Schools in Oregon, she hired Krenek to conduct eight more years of OAs.

## CANDID INSIGHT AND CREDIBILITY

Mary Paulson was Chief of Staff when she discovered the OA process at Salem-Keizer, where she spent more than 24 years of her career. She soon became an advocate for OA, traveling with Krenek to assist with organizational assessments at districts across the United States. Today, Paulson is the Deputy Executive Director of the Oregon School Boards Association.

“Having been on the receiving end of an organizational assessment and being a team member doing an organizational assessment, I can say that it gives the leaders of the organization candid insight into what’s going on in their organization,” Paulson says. “It also builds credibility at the leadership level, because it shows that district leaders have the courage to hear the good, the bad, and the ugly. That is not easy.”

The revelations from the Salem-Keizer district’s first OA certainly fit that description, Paulson notes.

“I was part of the shock and awe that we got afterward,” she remembers. “We had transitioned from one superintendent to the next, but our directors at the time really thought we had things working smoothly and that we were headed in the right direction. And what came out of the OA was completely opposite. In my role, I could see it coming, but the directors couldn’t see it. While OA is never a ‘gotcha,’ none of us anticipated how hard it would be.”

Though difficult, Paulson says, the OA process was good for the organization.

“The organizational assessment jolted people awake and made them realize that what they thought was going on with staff within the district wasn’t what was really going on,” she says.

OA is not a prescription for how to fix problems, but a roadmap to find where the problems are.

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“The very structured process Mardi uses is exactly how OA should be conducted,” Paulson says. “She works through indicators consistently to get balanced feedback. Mardi isn’t there to solve the problems. She brings out the themes, gives the district a grade on the most important metrics, and leaves the rest up to the district.”

The objectivity that comes from using an outside resource is necessary for an effective OA process, Paulson says, as it takes emotion out of the equation.

“An objective third party has no stigma and no preconceived notions,” Paulson points out. “You will always have a small group of people afraid to speak out; that’s human nature. A third party makes it easier to get past that fear. And, Mardi artfully manages the conversation so that instead of people focusing on emotions or negativity, they focus on the opportunity to better serve students.”

By repeating the process on an annual basis, districts can track and sustain progress over time.

“It’s not a ‘one and done’ process because you can’t measure growth or lack of growth if you only do it one time,” Paulson notes. “Over time, it just gets better.”

## ABOUT APQC EDUCATION

APQC helps organizations work smarter, faster, and with greater confidence. It is the world’s foremost authority in benchmarking, best practices, process and performance improvement, and knowledge management. Since 1996, APQC has been helping education leaders capture, scale, and sustain transformation to improve student outcomes through the implementation of Process and Performance Management methodologies and the identification of best practices. Among other things, we help educators redesign outdated or inefficient processes and break down functional silos to save time, money, and empower people. Learn more at [www.apqc.org](http://www.apqc.org).