

## TEMPLATE FOR SELF-ASSESSMENT REPORT I

### Section 1: Organizational Profile

The **Organizational Profile** is a snapshot of your organization, the key influences on how you operate, and the key challenges you face. Please provide a response to the following questions in no more than five (5) pages.

#### P.1 Organizational Description: What are your key organizational characteristics?

**Describe your operating environment and your key relationships with students, other customers, suppliers, partners, and stakeholders.**

*Within your response, include answers to the following questions:*

#### P.1a Organizational Environment

- (1) **Educational Programs and Services** What are your organization's main educational programs and service offerings? What is the relative importance of each to your success? What mechanisms do you use to deliver your educational programs and services?
- (2) **Vision and Mission** What are your stated purpose, vision, values, and mission? What are your organization's core competencies, and what is their relationship to your mission?
- (3) **Workforce Profile** What is your workforce profile? What are your workforce or faculty/staff groups and segments? What are the educational requirements for different faculty/staff groups and segments? What are the key elements that engage them in achieving your mission and vision? What are your workforce diversity and job diversity? What are your organized bargaining units? What are your organization's special health and safety requirements?
- (4) **Assets** What are your major facilities, technologies, and equipment?
- (5) **Regulatory Requirements** What is the regulatory environment under which you operate? What are the applicable occupational health and safety regulations; accreditation, certification, or registration requirements; education industry standards; and environmental, financial, and educational program and service regulations?

#### P.1b Organizational Relationships

- (1) **Organizational Structure** What are your organizational structure and governance system? What are the reporting relationships among your governance board, senior leaders, and parent organization, as appropriate?
- (2) **Customers and Stakeholders** What are your key market segments, student and other customer groups, and stakeholder groups, as appropriate? What are their key requirements and expectations for your educational programs and services, student and other customer support services, and operations? What are the differences in these requirements and expectations among market segments, student and other groups, and stakeholder groups?
- (3) **Suppliers and Partners** What are your key types of suppliers, partners, and collaborators? What role do they play in your work systems, especially in producing and delivering your key educational programs and services and student

and other customer support services? What are your key mechanisms for communicating with suppliers, partners, and collaborators? What role, if any, do these organizations play in contributing and implementing innovations in your organization? What are your key supply-chain requirements?

## **P.2 Organizational Situation: What is your organization's strategic situation?**

**Describe your competitive environment, your key strategic challenges and advantages, and your system for performance improvement.**

***Within your response, include answers to the following questions:***

### **P.2a Competitive Environment**

- (1) **Competitive Position** What is your competitive position? What are your relative size and growth in your education sector or the markets you serve? What are the numbers and types of competitors for your organization?
- (2) **Competitiveness Changes** What key changes, if any, are affecting your competitive situation, including opportunities for innovation and collaboration, as appropriate?
- (3) **Comparative Data** What key available sources of comparative and competitive data are available from within your education sector? What are your key available sources of comparative data from outside your education sector? What limitations, if any, affect your ability to obtain these data?

### **P.2b Strategic Context**

What are your key strategic challenges and advantages in the areas of educational programs and services, operations, societal responsibilities, and workforce?

### **P.2c Performance Improvement System**

What are the key elements of your performance improvement system, including processes for evaluation and improvement of key organizational projects and processes?

### **Page Limits**

The Organizational Profile should be limited to five (5) pages. ~~This section is not counted in the overall report's page limit of 40 pages.~~

## **Section 2: The Seven Categories of Performance Excellence**

### ***Directions:***

Using a total of not more than ten (10) pages, prepare a response to the following seven Categories.

### **1. Leadership**

Summarize how the personal actions of your senior leaders guide and sustain your organization. Summarize your organization's approach to responsible governance and to fulfilling its legal, ethical, and societal responsibilities. [Note: "Senior leaders" consist of the organization's chief executive and his/her direct reports.]

### **2. Strategic Planning**

Summarize how your organization develops strategic objectives and action plans, and implements them.

### **3. Customer Focus**

Summarize how your organization listens to the voice of the customer, engages its students and other customers for long-term market success, and builds relationships with students and other customers.

### **4. Measurement, Analysis, and Knowledge Management**

Summarize how your organization measures, analyzes, and then improves organizational performance. Summarize how your organization manages your knowledge assets, information, and information technology.

### **5. Workforce Focus**

Summarize how your organization builds an effective and supportive workforce environment. Summarize also how your organization engages your workforce to achieve organizational and personal success.

### **6. Operations Focus**

Summarize how your organization designs, manages, and improves its educational programs and services, as well as its work processes. Summarize also how it ensures effective management of operations on an ongoing basis and for the future.

### **7. Results**

Summarize your organization's performance and improvement in all key areas—student learning and process results; customer-focused results; workforce-focused results; leadership and governance results; and budgetary, financial, and market results.