



Strategic Alignment Pre-Checklist

To ensure we deliver and recommend high-quality, safe, and impactful programming to students, we evaluate potential partners against standardized benchmarks for operational readiness, data integration, and instructional quality. This checklist serves as a guidance framework for prospective partners seeking to collaborate with our schools.

Scale, Capacity & Infrastructure

- ☐ **Proven Footprint & Maturity:** Can the partner verify active service delivery across **500+ school sites** (or scale-equivalent infrastructure) with a high rate of multi-year school retention (>85%)?
- ☐ **Regional & Site Support Models:** Does the partner maintain dedicated regional coordinators, account managers, or site leads to handle large-scale deployment?
- ☐ **Centralized Data & Tech Systems:** Does the partner utilize enterprise-grade data platforms capable of tracking performance metrics across multiple sites?
- ☐ **Financial & Staffing Resilience:** Does the partner possess HR and recruitment pipelines capable of continuous staffing without service interruption?

Mission, Needs & MTSS Alignment

- ☐ **Documented Need Alignment:** Does the partner directly address a documented school improvement goal, target demographic, or academic/behavioral priority?
- ☐ **Explicit MTSS Tier Categorization:** Is the partner's program explicitly mapped to a specific tier within the MTSS framework?
- ☐ **Core Instruction Protection:** Does the partner guarantee that Tier 2/3 interventions supplement core Tier 1 instruction rather than pulling students away from foundational academic time?
- ☐ **Diversity, Equity & Inclusion:** Does the partner demonstrate proven cultural competency and alignment with inclusive educational practices?

Data, Progress Monitoring & Interoperability

- ☐ **Data Integration:** Can the partner provide progress data (at least monthly) directly to schools and districts?
- ☐ **Fluid Entry & Exit Protocols:** Does the partner provide objective, data-driven criteria for student entry, tier transitions, and exit from the program (Tier 2/3 only)?
- ☐ **Evidence-Based Programming:** Are the partner's materials and methods validated by research or aligned with best practices and learning standards?

Operations, Logistics & Legal Compliance

- ☐ **Safety Clearances:** Is there **100% verification** of background checks, child abuse clearances, and required health screenings for all partner personnel prior to day one?
- ☐ **Legal & Compliance Documents:** Are formal Data Sharing Agreements (DSA), Business Associate Agreements (BAA), and a Memorandum of Understanding (MOU) drafted with clear roles, liability, and termination clauses?
- ☐ **Facilitator Ratios:** Is a clear staff-to-student ratio (e.g., maximum 1:12–1:15 for interventions) defined and maintained (Tier 2/3 only)?
- ☐ **Insurance & Liability Coverage:** Does the partner provide a valid Certificate of Insurance (COI) demonstrating general liability (minimum \$1M per occurrence / \$2M aggregate), sexual misconduct/abuse liability, and workers' compensation coverage?

Disclaimer: While these standards apply to all external organizations, rare exceptions or alternative compliance pathways may be granted on a case-by-case basis.