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Positive Behavioral  
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# THE WORKING SMARTER MATRIX: GROUP SELF-ASSESSMENT AND ACTION PLANNING TOOL

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# The Working Smarter Matrix: Group Self-Assessment and Action Planning Tool

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## Purpose

Having multiple teams, committees, or workgroups that address similar needs within a given organization can lead to confusion over responsibility, staff overload, and potential duplication of efforts. The Working Smarter Matrix is a self-assessment and action planning tool designed for leadership teams to evaluate and streamline teaming structures and routines for increased and specific impact.



## Introduction

Leadership teams are a key component of the multi-tiered positive behavioral interventions and supports (PBIS) framework, guiding implementation, monitoring effectiveness, and providing continuity within and across implementation tiers (e.g., universal, targeted, and intensive support) and contexts (e.g., state, region, district, school). PBIS leadership team members are representative of a range of roles (e.g., administration, certified and non-certified educators, families, students, and community organizations) and areas of expertise (e.g., academic and behavioral support, leadership, coaching, equitable implementation, data-based decision making).

When first implementing PBIS, a critical step is identifying, evaluating, and streamlining other existing teams. For example, most schools have teams of faculty and staff that meet to collaborate around academics, behavior, and/or safety. Leadership team members can use the Working Smarter Matrix to assess and enhance the efficiency, effectiveness, and relevance of their existing teams, committees, or workgroups within their organization. In this brief, we (a) guide leadership team members through using the Working Smarter Matrix and (b) share a school-level example to illustrate how a leadership team used this process to work smarter, not harder.

## Working Smarter: Three Simple Steps

Leadership team members can use the Working Smarter Matrix to self-assess (Step 1), prioritize (Step 2), and action plan (Step 3) to streamline existing teaming structures.

### Step 1. Self-Assess

Leadership team members complete the Working Smarter Matrix (**Appendix A**) to self-assess their existing teams. First, they identify and describe each team, committee, or workgroup in their school that supports social-emotional-behavioral (SEB) health (e.g., Mental Health, MTSS, Climate). Specifically, leadership team members complete the following sections (i.e., columns) for each team (i.e., row) on the matrix:

- 1. Name**—*What is this team called?*
- 2. Purpose**—*Why was this team formed, and why do they meet?*
- 3. Outcomes**—*What kind and level of change/improvement is expected?*
- 4. Target Audience**—*Who is expected to benefit directly from the efforts of this team?*
- 5. Collaborators**—*Who are the active members on this team?*
- 6. Alignment**—*How do the efforts of this team align with the school/district mission or values?*
- 7. Priority or Need**—*How important is this team to the school?*
- 8. Overlap**—*How does this team's activities overlap with other teams?*



## Step 2. Prioritize

As the leadership team members discuss their matrix, they prioritize retaining or combining teams that meet the following criteria:

- Specification of their **purpose** and their **target audience**
- A process to collect and examine **measurable outcomes** or objectives
- **Data** to justify their need and priority
- **Support** from leadership at the state, district, and/or school level
- **Alignment** with the top school and/or district mission, values, or priorities
- “Full” (>80%) **commitment/agreement** of the school staff

Specifically, once leadership team members complete their Working Smarter Matrix, they evaluate each existing team along these criteria, identify overlap, and streamline.

**2a. Evaluate Each Existing Team.** First, leadership team members examine each existing team and determine whether each team meets the above criteria.

- If a team does not meet most/all criteria, they consider eliminating the team.
- If a team meets most/all criteria, they plan to retain the team.

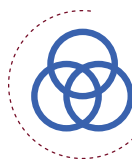
**2b. Identify Overlap.** Next, leadership team members compare the purpose (Column 2), outcomes (Column 3), targeted audience (Column 4), and collaborators (Column 5) among the remaining teams.



**2c. Streamline.** While comparing, leadership team members consider and document overlap with other existing teams (Column 8). If an overlap is identified, leadership team members decide how to address the overlap so that all teams function efficiently. For example, they may decide to combine or restructure teams so that each team has a unique purpose, measurable outcomes, target audience, and collaborators.

## Step 3. Action Plan

Finally, the leadership team members create an action plan (**Appendix B**) to ensure that any changes are implemented within an established timeframe, thus increasing accountability and enhancing efficiency. The action plan is designed to facilitate team decision-making by identifying (a) which items will be the focus of implementation efforts, (b) what the specific action(s) will be, (c) who will take the lead in completing the action, and (d) a date by which the action is expected to be completed.



## Working Smarter Matrix: School-Level Example

While the Working Smarter Matrix can be utilized across contexts (e.g., state, region, district, school), the following example describes the process a school-level PBIS leadership team used to complete, prioritize, and action plan using the Working Smarter Matrix.

*The school administrator, with support from the administrative assistant, scheduled a meeting to discuss the overlap among committees and the need to eliminate those that did not align with the school's mission and vision. Each committee chair was identified, including the date/time/location of the meeting. During the meeting, the team completed the Working Smarter Matrix for each team (see Table 1).*

**Table 1. Working Smarter Matrix: School-Level Example**

Team Name	Purpose	Outcomes	Target Audience	Collaborators	Alignment with School/District Mission or Values	Priority (1=Low, 5=High)	Overlaps With... (other groups)
Attendance	Support high daily student attendance	<ul style="list-style-type: none"> <li>Average Daily Student Attendance</li> </ul>	All students and families	Dean, School Counselor, School Social Worker, Attendance Clerk, PTO Representative (Rep)	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	4	PBIS
School Safety	Ensure the safety of everyone on campus	<ul style="list-style-type: none"> <li>Office Discipline Referrals for Bullying</li> <li>Climate/ Satisfaction Surveys</li> </ul>	All students, staff, and families	Administrator, School Counselor, SRO, PTO Rep	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	5	Discipline, Climate, PBIS
Attendance Awards Committee	Identify students who have achieved perfect attendance each quarter	<ul style="list-style-type: none"> <li>Students with zero Absences Each Quarter</li> </ul>	All students and families	Social Worker, Attendance Clerk, School Counselor	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	3	Attendance, PBIS
Discipline	Ensure an effective discipline process is in place	<ul style="list-style-type: none"> <li>Office Discipline Referrals</li> <li>In &amp; Out-of-School Suspensions</li> <li>Detention</li> </ul>	All students	Dean, School Counselor, ISS and Detention Staff	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	5	Safety, PBIS
School Climate	Promote a healthy school climate for all	<ul style="list-style-type: none"> <li>Student, Staff, and Family Satisfaction Surveys</li> </ul>	All students, staff, and families	Administrator, School Counselor, PTO Rep, Student Council Rep	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	4	Safety, PBIS
Tier 1 PBIS	Develop and maintain a Tier 1 behavior system that is responsive to ALL collaborators.	<ul style="list-style-type: none"> <li>Exclusionary Outcomes</li> <li>Office Discipline Referrals</li> <li>Attendance</li> <li>Disproportionate Outcomes</li> </ul>	All students, staff, and families	Administrator, Teachers (Gen Ed & SPED), School Counselor, PTO Rep, Student Rep, School Psychologist, Mental Health Expert	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	5	Attendance, Safety, Discipline, Climate





*When examining the information collected in Table 1, the team notes that there is overlap between the attendance committee and the attendance award committee. Additionally, when the team examines the data and outcomes for the attendance award committee, they realize that, compared to other student groups, students with disabilities are not receiving as many awards. This conflicts with the value and mission of the school to ensure that all students participate in being recognized. Therefore, this committee is likely to be combined under the attendance committee, which can consider continuing the work of this activity and align with school values.*

*On the first day of pre-planning, the administrator will set a time to meet with both groups. The administrative assistant will send an email to assist with scheduling the meetings to discuss reorganization. Before consolidating, the administrator or designee will check with the parent organization to consider the importance of the attendance awards to the families in the school and gather feedback on how to better align with the school values around inclusive practice for all students.*

## Summary

The Working Smarter Matrix is a tool designed for leadership teams to help consolidate group efforts for increased and specific impact. Establishing a team and identifying its purpose is just one of the first steps when preparing to install a multi-tiered systems approach, such as the PBIS framework. However, some organizations may need to take time to build a representative leadership team before creating a shared vision and goals aligned with their strategic plan (e.g., school improvement plan). Other leadership



teams may be well-established and ready to conduct a broader needs assessment to analyze data on current behavior trends, disciplinary practices, and school climate. Whereas an advanced implementing team may need to revisit membership to ensure the representation still aligns with the current vision and implementation goals. Regardless of where your team is in the continual improvement process, there are many Center on PBIS resources available to assist you on this implementation journey.



## Related Resources

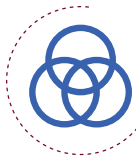
- 1. PBIS Implementation Blueprint**  
<https://www.pbis.org/resource/pbis-implementation-blueprint>
- 2. Tiered Fidelity Inventory (TFI) 3.0**  
<https://www.pbis.org/resource/tfi-3>
- 3. PBIS District Systems Fidelity Inventory (DSFI) Manual**  
<https://www.pbis.org/resource/dsfi>
- 4. PBIS State Systems Fidelity Inventory (SSFI) Manual**  
<https://www.pbis.org/resource/ssfi>
- 5. Enhancing Team Functioning in Schools' Multi-Tiered Systems of Support**  
<https://www.pbis.org/resource/enhancing-team-functioning-in-schools-multi-tiered-systems-of-support>
- 6. How School Teams Use Data to Make Effective Decisions: Team-Initiated Problem Solving (TIPS)**  
<https://www.pbis.org/resource/how-school-teams-use-data-to-make-effective-decisions-team-initiated-problem-solving-tips>
- 7. Enhancing Social Emotional and Behavioral (SEB) Support: A Practical Guide for Selecting and Implementing SEB Programs within a Positive Behavioral Interventions and Support (PBIS) Framework**  
<https://www.pbis.org/resource/enhancing-social-emotional-and-behavioral-seb-support-a-practical-guide-for-selecting-and-implementing-seb-programs-within-a-positive-behavioral-interventions-and-support-pbis-framework>
- 8. Advancing Education Effectiveness: Interconnecting School Mental Health and School-Wide PBIS, Volume 2: An Implementation Guide**  
<https://www.pbis.org/resource/interconnecting-school-mental-health-and-pbis-volume-2>

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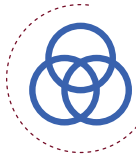
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## Appendix A. Working Smarter Matrix

Team Name	Purpose	Outcomes	Target Audience	Collaborators	Alignment with School/District Mission or Values	Priority (1=Low, 5=High)	Overlaps With... (other groups)
					<input type="checkbox"/> Yes <input type="checkbox"/> No		
					<input type="checkbox"/> Yes <input type="checkbox"/> No		
					<input type="checkbox"/> Yes <input type="checkbox"/> No		
					<input type="checkbox"/> Yes <input type="checkbox"/> No		
					<input type="checkbox"/> Yes <input type="checkbox"/> No		
					<input type="checkbox"/> Yes <input type="checkbox"/> No		





## Appendix B. Action Plan to Accompany the Working Smarter Matrix

Areas of Focus	Actions	Who	When