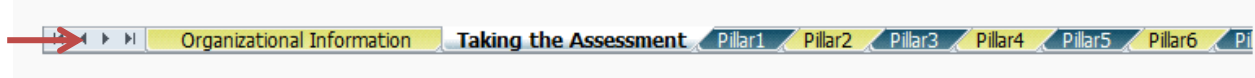


# PIOSA GETTING STARTED CHECKLIST

## 1. Download the PIOSA Workbook file to your computer.

Save a MASTER file of the workbook (e.g., PIOSA\_YourOrg\_Date.xlsx).

## 2. Take a tour of the workbook tabs.



Use the arrow in the lower-left corner of the screen to scroll, if necessary.

**Tab 1:** Organizational Information - Enter your organization, a description of how you're using the self-assessment, PIOSA participants, and date

**Tab 2:** Taking the Assessment - Definitions and other tips to help you complete the PIOSA

**Tabs 3-9:** PIOSA – Pillar by Pillar - The seven modules that make up the PIOSA

**Tab 10:** Plans for Improvement - Track your notes about what you'll do after the discussion. Feel free to customize to suit your needs

**Tab 11:** Glossary – Selected list of terms used in the PIOSA.

## 3. Complete the Organizational Information.

Enter your organization, a description of how you're using the self-assessment (e.g., board retreat, planning session), PIOSA participants, and date. You can use this tab as a cover page when you're ready. Your information will be automatically included at the top of each PIOSA pillar.

## 4. Create the file(s) to use with your organization.

For a group discussion, save one file. If individuals are filling out the self-assessment and bringing their copies to a team discussion, you'll need a file for each user. Consider adding a date and user name to individual files (e.g., PIOSA\_YourOrg\_Date\_JohnDoe.xlsx) to avoid overwriting files or version-control issues.

## 5. Save early; save often!

We can't count the number of times that a technical glitch has caused us to lose information so we're big believers in frequent file saving.

## 6. Get started.

Best wishes on your journey.