

STEWARDSHIP READINESS INSTITUTE

Pilot Institution Onboarding Kit

Version 1.0

This document is provided to institutions evaluating initial SRI deployment.

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PILOT DEPLOYMENT OVERVIEW

1. Purpose of Pilot

The pilot phase is designed to:

- Assess instrument fit within institutional culture
- Test deployment logistics
- Evaluate governance integration
- Establish data handling protocols

The pilot does not constitute long-term licensing.

2. Recommended Pilot Structure

Phase 1 — Leadership Cohort Selection
5–12 participants recommended

Phase 2 — SRI-16 Self & 360 Administration

Phase 3 — Facilitated Debrief Sessions

Phase 4 — Governance Risk Review (Optional SRI-24 for senior leadership)

Phase 5 — Institutional Reflection & Adjustment

Total duration: 6–10 weeks.

3. Data Governance Framework

Institution must designate:

- Data custodian
- Confidentiality protocol
- Secure data storage method
- Data retention timeline

SRI does not retain identifiable raw data unless separately contracted.

4. Pilot Deliverables

Institution receives:

- Aggregated domain analysis
- Composite scoring overview
- Risk threshold indicators
- Governance safeguard recommendations
- Development planning guidance

No individual ranking reports are provided.

5. Ethical Boundaries

SRI instruments:

- Must not be used for employment decisions
- Must not be tied to compensation
- Must not be used as performance ratings
- Must not be integrated into disciplinary processes

Violation terminates pilot eligibility.

6. Pilot Evaluation Criteria

Institution should assess:

- Psychological safety during administration
 - Participant perception of fairness
 - Clarity of interpretation
 - Applicability to governance context
 - Feasibility of ongoing deployment
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7. Transition to Full Licensing

Upon successful pilot completion, institution may:

- Enter annual licensing agreement
- Expand facilitator certification internally
- Integrate benchmarking dashboard
- Deploy SRI-24 for governance roles

Licensing agreements are separate from pilot evaluation.