Balanced Scorecards for School Districts

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In the following report, Hanover Research reviews best practices in structuring and implementing balanced scorecards at the district level.

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EXECUTIVE SUMMARY AND KEY FINDINGS

INTRODUCTION

In the following report, Hanover Research discusses best practices in the use of balanced scorecards by districts. The first section reviews available literature on the main benefits of balanced scorecards and offers guidelines on the structure, measures, and implementation processes found to be most effective among districts. Next, we profile three best practice districts' approaches to the balanced scorecard, reviewing implementation processes as well as key features. We also include examples of measures used to assess nontraditional objectives by other districts.

KEY FINDINGS

- **The main benefits of balanced scorecards relate to the ease of assessing district and school performance across a variety of metrics, linking financial data to other indicators of district performance and monitoring progress toward measurable goals**. Balanced scorecards also eliminate redundancies in data collection and assessment, increase transparency, and facilitate improvement processes, among other benefits. Drawbacks to the use of balanced scorecards are rarely discussed, though an overreliance on student achievement data has been found to be problematic.

- The structure differs by district, but features of balanced scorecards found to be most effective include a clear and understandable design, linked data points (over time and across different kinds of data), and real-time progress-monitoring.

- **The most common metrics used to measure outcomes include student performance data, enrollment and employment counts, revenue and expenditure data, instructional and curricular activities, human capital operations, and business practices**. Most of these metrics have clear linkages to goals and outcomes, though nontraditional objectives tend to be measured using stakeholder satisfaction survey items.

- The process of implementing a balanced scorecard can be summarized by the following steps: establishing the district's vision, mission, and values; creating individual strategies to achieve the district's vision and mission; identifying measurable outcomes to demonstrate progress toward the district's goals; collecting data; and disseminating information on progress using the balanced scorecard. Throughout this process, it is especially important to maintain communication with stakeholders to ensure that all schools' and departments' needs are met.

SECTION I: LITERATURE REVIEW

In the following pages, we review available literature on the use of balanced scorecards in education. We begin with an overview of the main benefits associated with their use and follow with expert guidance on the structure, metrics, and implementation processes associated with highly effective balanced scorecards.

MAIN BENEFITS OF BALANCED SCORECARDS

The main benefits of balanced scorecards can be seen in how a district manages the information after the scorecard has been implemented. First, **using the scorecard allows districts to break down a broad array of objectives from school and district improvement plans into more measurable goals and then determine exactly what needs to be done to achieve those goals and how to measure progress**.[1] Additionally, because of the focus on financial data, balanced scorecards enable districts to "identify how various operational metrics impact" financial performance.[2] Balanced scorecards also permit district leaders to address "many ostensibly disparate corporate concerns, such as improving customer relations, boosting product quality, investing in research and development, and developing employees."[3]

Accounts from district leaders with experience in using balanced scorecards provide further evidence of their advantages. Scott Cowart, former Superintendent of Monroe County Schools in Forsyth, Georgia, describes some of the most notable benefits of using balanced scorecards in his district:[4]

- The balanced scorecard **generated transparency that increased trust** among all stakeholder groups. The ability to see clear patterns of performance amidst higher expectations raised the sense of urgency and reduced the time needed for change to take place.

- The intentional transparency **engendered confidence in the new improvement practices**. The new openness of the district was appreciated, and the district's efforts to improve student performance led to overwhelming support for the passage of two local-option, sales tax referenda for public education during an eight-year period.

- The process helped the district **coordinate resources to support the schools' efforts**. The board's clear expectation led to a significant improvement in student attendance in every school except one the next school year.

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[1] Archer, J. "Districts Tracking Goals with 'Balanced Scorecards.'" *Education Week*, 26:4, 2007. http://www.darden.virginia.edu/web/uploadedFiles/Darden/Darden_Curry_PLE/News/DistrctsTrackingGoalsWith BalancedScoreCard.pdf

[2] Hess, F. and Fullerton, J. "Balanced Scorecards and Management Data." Center for Education Policy Research Working Paper Series, 2009, p. 4. http://www.gse.harvard.edu/~pfpie/pdf/Balanced_Scorecards_and_Management_Data.pdf

[3] Ibid.

[4] Bullets quoted with slight variation from Cowart, S. "Driving Improvement with a Balanced Scorecard." *The School Administrator*, 67:2, 2010. http://www.aasa.org/SchoolAdministratorArticle.aspx?id=11684&terms

- The balanced scorecard enabled school leaders to **consolidate the unaligned parts of the improvement planning process into one continuous improvement structure** that supported operational and strategic improvement. Each school developed an improvement plan that nested under the district's improvement plan, sharing identical strategic goal areas and performance objectives. The balanced scorecard's alignment with school improvement plans proved to be powerful. For the first time, district functions such as the school nutrition and transportation departments had concrete and visible metrics and were able to link their improvement strategies to the district improvement plan.

- This systemic approach **reduced the time, energy, and effort** needed by school and district leaders to align performance improvement approaches at all levels. Stakeholders saw the seamless system connecting all aspects of performance: planning, measuring, monitoring, managing and communication.

STRUCTURE

Frederick M. Hess, Director of Education Policy Studies at the American Enterprise Institute, and Jon Fullerton, Executive Director of the Harvard University Center for Education Policy Research, have written extensively on the optimal structure and metrics of balanced scorecards used in the education sector. In their 2009 paper, Hess and Fullerton assert that "six key needs, forming a rough hierarchy" are necessary for districts to collect data for meaningful decision-making and management using the balanced scorecard model.[5]

The first element is a building block for the remaining five needs: "**accurate collection of basic student, financial, and human resource data**." Districts must obtain a variety of data points on enrollment, employment, and expenditure. Such data allow the district to ensure, for example, "that accounts are not overspent, that school enrollment and attendance figures are accurate, and that only authorized persons are on the payroll." Next, districts build on the accurate collection of basic data by **linking data over time**. Doing so permits the district to assess changes in performance from one year – or term – to the next.[6]

The next element is **customer service and satisfaction data**. By measuring customer satisfaction internally (i.e., staff and administrators) and externally (i.e., students, families, and the community), districts can "quickly diagnose operational or professional issues that will hurt their ability to maintain the confidence of the people they serve." To make real progress in this area, districts must "routinely and systematically" collect and analyze customer service and satisfaction data. Recurring surveys administered to key stakeholders are particularly effective for addressing this dimension.[7]

The fourth element, according to Hess and Fullerton, is "**data with sufficient granularity to illuminate units and activities within departments**." This form of data can be described as additional outputs or practices that demonstrate how a department uses its resources and the efficiency with which it carries out processes. An example provided by the authors

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[5] Hess and Fullerton, Op. cit., pp. 5-6.
[6] Ibid.
[7] Ibid.

indicates how data might be collected for a human resources division: "when considering the role of human resources, there are various metrics that might help illuminate how resources are being used and opportunities for improved productivity. Typically, systems will know how much is spent on human resources and the size of the staff, but not how much time the human resources staff spends on recruitment or responding to the needs of teachers and principals."[8]

The next level involves "**data connected across content areas (and to outcomes)**," which allow the district to assess an individual department's or program's effectiveness. Districts can link outcomes from student-level longitudinal test data, employee retention data, and stakeholder survey data to such inputs as human resources system data, professional development programs, and student interventions. Hess and Fullerton write that "with this level of data sophistication, it becomes feasible to start conducting cost-benefit analyses of programs, services, and organizational units."[9]

The final element necessary for an effective balanced scorecard is **real-time data collection, analysis, and dissemination**. A balanced scorecard is most effective if district administrators can assess key metrics instantly: for example, "which schools are waiting for textbooks or which teachers have received what professional development."[10]

METRICS

Hess and Fullerton continue their guidelines for effective use of balanced scorecards in education by asserting that there are six major forms of data that should be collected by districts.[11] The first, and perhaps the most obvious, is **student outcomes** data. It is essential, however, for districts to collect student performance data beyond state assessments. Examples of such data include:[12]

- Performance of students on various sub-strands (e.g., number sense, spatial relations on the math test) of state tests with results taken down to (and accessible to) the classroom teacher.

- Item-level analysis at the individual student and classroom level. This allows teachers to analyze whether all or most of their students miss the same test items – and then to adjust their teaching strategies.

- Results of benchmark tests provided back in a timely manner (e.g., no more than one or two days after the test is completed).

- Employment or enrollment status of students after high school.

The second form of data relates to "**counting and tracking people and things**." Districts must monitor enrollment and employment counts, the state of physical facilities, and all

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[8] Ibid.
[9] Ibid.
[10] Ibid.
[11] Ibid., pp. 7-9.
[12] Bullets quoted verbatim from Ibid.

other "relevant district assets" to obtain operational baselines. Key elements involved in such counting and tracking consist of:[13]

- Authorized staff positions, the location of the positions, the purpose and reporting relationships of the positions, whether they are filled and by whom, and whether they are full or part time.

- District assets and materials, where they are located, and the transfer of assets between locations (e.g., the delivery of textbooks).

- Students, which schools and classrooms they attend, and the teachers and staff in those schools and classrooms. This should include not just the "teacher of record" for the students, but also aides, tutors and other staff working with the student.

- Teacher and student attendance – and the reasons for absences.

The third form of data measures **finance and spending**, particularly "tracking expenditures in ways that facilitate useful analysis." Districts must understand more than simply *how much* is spent and instead be able to "link dollars and time spent by employees to locations, activities, reporting structures, and, if appropriate, students." Examples of data points related to finance that surpass those typically tracked by districts include:[14]

- Are dollars actually being spent in specific schools and classrooms or are they being spent by central administration and then "allocated" to school sites based on calculations and projections (e.g., total heating costs for the district distributed proportionally to all schools by number of students)?

- Who controls the decision to make the expenditure and for whom does the expenditure take place? For instance, is a school-based professional development program purchased by the office of instruction at the central office or by an individual principal or by an individual teacher? Each of these expenditures are for teachers at the school; however, those held accountable for these expenditures should be quite different.

- What program, activity, and function do the expenditure support?

Fourth, to assess the effectiveness of particular resources, programs, and personnel, districts must "track **instructional and curricular services** in a manner that makes it possible to determine who got what services and when." Key data points include:[15]

- What professional development is delivered to which personnel, when, for what length of time, and by whom?

- What tutoring or afterschool programs are delivered to which students, when, for what length of time, and by whom?

- Which reading programs and which math programs are being used by which schools? How well are they implemented, at what cost, and with what results?

- What texts and ancillary materials are utilized by which schools, classrooms and students?

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[13] Bullets quoted verbatim from Ibid.
[14] Bullets quoted verbatim from Ibid.
[15] Bullets quoted verbatim from Ibid.

Hess and Fullerton assert that the fifth form of data, **human capital operations**, may be "more crucial than any other element of school system management." Districts manage a variety of human resource functions, such as: hiring and firing employees; monitoring and assessing performance; and providing performance-based compensation. Hess and Fullerton write that, to improve the quality of teaching and learning, "the key is to measure human capital operations not in terms of inputs (number of hires or percentage of educators with advanced degrees) but with metrics that reflect meaningful performance." Key data points in the area of human capital consist of:[16]

- The quality of new hires, in terms of skills, experience, past performance, qualifications, or interview grades.

- The quantity of applicants for positions, how rapidly they are screened and offers made, and the rapidity with which successful applicants are placed and prepared.

- The satisfaction of employees with the support and responsiveness of human resources to various concerns.

- The performance of instructional personnel, support staff, and school leaders as measured by student progress (potentially including standardized assessments, promotion, graduation, course selections, and attendance).

- The performance of personnel on relevant metrics beyond student achievement (e.g., soliciting "forced rankings" of teachers by their principals or supervisors, while systematically collecting evaluations of supervisors by their staff).

The sixth and final form of data, according to Hess and Fullerton, is **business practices** such as "procurement, information technology, data management, and maintenance which facilitate system operation." Processes such as these that support teachers and school leaders must be measured "in terms of core metrics that accurately reflect performance." Examples include:[17]

- How long does it take the district to process a supply request, how rapidly are supplies delivered to the classroom, and how does the system's cost per order compare to benchmarks?

- How rapidly are school personnel able to access the results of formative assessments, how satisfied are they with the user-friendliness of the data interface, and how intensively/extensively do faculty make use of formative assessments and student data?

- How rapidly does the facilities team respond to complaints and what percentage of complaints is resolved on the first visit? How many work orders do maintenance teams perform in a week?

- What is the cost per square foot of maintenance and what is the staff satisfaction rate with the physical condition of the school?

Meanwhile, in a 2005 article in the *Journal of Education for Business*, Demetrius Karathanos and Patricia Karathanos connect the Baldrige Education Criteria for Performance Excellence

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[16] Bullets quoted verbatim from Ibid.
[17] Bullets quoted verbatim from Ibid.

to balanced scorecards in education. The authors write that organizational performance can be best measured by the following six forms of data:[18]

- **Student learning results**: Results should be based on a variety of assessment methods, should reflect the organization's overall mission and improvement objectives, and together should represent holistic appraisals of student learning.

- **Student- and stakeholder-focused results**: Student and stakeholder satisfaction measurements about specific educational program and service features, delivery, interactions, and transactions that bear upon student development and learning and the students' and stakeholders' future actions.

- **Budgetary, financial, and market results**: Instructional and general administration expenditures per student, tuition and fee levels, cost per academic credit, resources redirected to education from other areas, scholarship growth.

- **Faculty and staff results**: Innovation and suggestion rates; courses or educational programs completed; learning; on-the-job performance improvements; crosstraining rates; collaboration and teamwork; knowledge- and skill-sharing across work functions, units, and locations; employee well-being, satisfaction, and dissatisfaction.

- **Organizational effectiveness results**, including key internal operations performance measures: Capacity to improve student performance, student development, education climate, indicators of responsiveness to student or stakeholder needs, supplier and partner performance, key measures or indicators of accomplishment of organizational strategy and action plans.

- **Governance and social responsibility results**: Fiscal accountability, both internal and external; measures or indicators of ethical behavior and of stakeholder trust in the governance of the organization; regulatory and legal compliance; organizational citizenship.

The figure below provides examples of individual measures for several of the categories listed above used by the first two recipients of the Baldrige Education Award, Chugach School District in Anchorage, Alaska and Pearl River School District in Pearl River, New York.

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[18] Karathanos, D. and Karathanos, P. "Applying the Balanced Scorecard to Education." *Journal of Education for Business*, 80:4, 2005, pp. 224-225. http://jsofian.files.wordpress.com/2007/02/applying-bsc-in-education.pdf

Balanced Scorecard Measures of Baldrige Education Award Recipients

MEASURE	CHUGACH SCHOOL DISTRICT (2001)	PEARL RIVER SCHOOL DISTRICT (2001)
Student Learning Results	California Achievement Test Woodcock Reading Mastery Test High School Graduation Qualifying Exam Self-assessment: spelling, reading, language, math Student learning profile	Regents diploma rate Mastery performance – reading, math Regents content exams Final grade point average Advanced Placement participation rate and course performance College attendance rate SAT I and II participation rate and achievement rate Grade 4 and 8 ELA and math proficiency
Student- and Stakeholder-Focused Results	Stakeholder (student, community, staff) satisfaction with: leadership, strategic planning, stakeholder focus, information, staff, processes, results Satisfaction of graduates with: basic skills, individual needs, character development, transition skills, technology Average daily attendance Student work-based learning hours Participation of other district students in work-based learning	Overall student satisfaction Key satisfaction indicators: teachers, technology, atmosphere Drug abuse Dropout rate Attendance rate Participation in extracurricular activities Parent overall satisfaction Satisfaction with home schooling Student transportation complaints Employer survey on student preparation for employment Alumni satisfaction: preparation for college, guidance services, writing, math Student attrition Budget vote plurality Prospective homeowner requests New family-perceived value of district Positive referrals
Budgetary and Financial Results	Revenues: federal, state, grants State funds allocated to: instruction, operations Sources of funding allocated to: individual needs, technology, transition skills, basic skills, character development, per-pupil spending, federal funds, state funds, grants	Costs per pupil Expenditures for: building administration, plant operations, Board of Cooperative Educational Services administration, teacher salaries, benefits Market share (vs. private schools)
Faculty and Staff Results	Staff evaluation of: leadership, strategic planning, students/community, information, faculty/staff, educational and support processes, results Staff in-service days Performance-based pay E-mail use	Workers compensation injuries Environmental factors: health, safety, ergonomics Faculty satisfaction Staff satisfaction Staff turnover Labor grievances Faculty/staff development: building leadership team, personal growth and development, faculty training hours New employee orientation Staff satisfaction with superintendent's fall and spring conference days Efficiency of staff development programs Communication between grade levels

MEASURE	CHUGACH SCHOOL DISTRICT (2001)	PEARL RIVER SCHOOL DISTRICT (2001)
Organizational Effectiveness Results	Performance of high school graduates in 10 curricular standard areas: reading, writing, mathematics, technology, cultural awareness and expression, personal/social/health, career development, service learning, social sciences, science High school credits earned by 8th graders Contextual education hours offered per student per week Percentage of eligible students who participate in school-to-work program Percentage of students who access the Internet for increased productivity School site bandwidth Percentage of staff assisting other districts	Efficiency of educational design and delivery (percentage meeting proficiency on ELA) Faculty not meeting performance criteria Student satisfaction with guidance and counseling Percentage of students in general education Percentage of "classified" students Number of scholar athlete teams Cost of student transportation Safety of student transportation Purchase-order cycle time Quality of copying Cost of copying Efficiency of technology: "up" time, faculty satisfaction, student satisfaction Student enrollment Number of teachers Regulatory compliance: right to know, OSHA, NYSED, IDEA, health/safety Legal: sexual harassment, policy book, contracts, fire inspections Ethical: BOE, Student, and Athlete Codes of Ethics Public complaints Adult education and parent university participation

Source: Karathanos and Karathanos, 2005[19]

IMPLEMENTATION

Implementation of the balanced scorecard requires careful planning and a commitment to its continued use from several levels of personnel. District leaders must consider the needs of a variety of stakeholder groups including the board of education, teachers and other district staff, students, families, the community, and business partners. Data must be updated regularly to ensure that the balanced scorecard is current, and progress must be monitored continuously.[20] Overall, the process of implementing a balanced scorecard can be broken down into four basic steps:[21]

- Identification and alignment of the vision, values and mission of the district

- Creation of strategies to achieve the vision and mission, focusing on key result areas

- Identifying performance measures for ongoing monitoring

- Creation of a Dashboard to track the scorecard measurements, so they are aligned

Individual districts that have implemented balanced scorecards successfully provide more concrete guidance on what strategies were most effective. For example, leaders from

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[19] Ibid., pp. 227-229.
[20] Wald, C. "Transparency through Balanced Scorecards and Dashboards." *MSBO eNews&Views*, 2011.
http://www.msboinfo.org/transparency_through_balanced_scorecards_and_dashboards
[21] Bullets quoted verbatim from Ibid.

Atlanta Public Schools in Atlanta, Georgia found the following principles particularly important:[22]

- **Mobilize change through executive leadership**. Breakthrough results are the result of strong leadership with a clear strategy. To drive change, executives must develop a case for change and a vision and strategy on where they want to drive the organization.

- **Translate the strategy into operational terms**. The strategy map and scorecard translate the district's strategy into terms that everyone in the organization can understand and act upon.

- **Align the organization to the strategy**. Once a balanced scorecard has been created at the top level of an organization, its objectives cascade down to operating and support units. This allows each area of the organization to understand how it contributes to the strategy.

- **Make strategy everyone's job**. While strategy may be formulated at the central office, it must be executed at each school. Communication and education are critical for strategy execution, as are aligning incentives and personal objectives.

- **Make strategy a continual process**. The balanced scorecard allows strategy to happen continually, not just at an annual strategy review session. The scorecard serves as the agenda for facilitating ongoing strategic discussions.

In their experience working with different types of organizations, balanced scorecard experts Robert Kaplan and Dylan Miyake learned "a few important lessons that can help or hinder leadership's goals." These lessons include:[23]

- **Listen to stakeholders**. The balanced scorecard only will be effective if it reflects "the realities the schools face every day." District leaders must solicit ideas from stakeholders within the schools and address their needs in the strategy map and balanced scorecard.

- **Communicate early and often**. In addition to listening, district administrators must communicate with stakeholders "early and often about the strategy, the map and the scorecard." Communication helps alleviate anxiety surrounding change, particularly change involving measurement.

- **Deploy in phases**. Phasing in the balanced scorecard is essential. Gradual deployment ensures that any issues or problems have been addressed before implementation at the school or departmental levels. It is critical that leaders make the strategy "clear and sustainable before introducing it to the principals and the schools" and demonstrate how the balanced scorecard can eliminate redundancies in data collection and reporting.

- **Staff and train appropriately**. Keeping participants engaged in the balanced scorecard process can be challenging, and one way to address this is to assemble a team to simplify the process by providing training and best-practice templates. It is also important to establish a "'strategy management office' to coordinate all the processes of the new strategy management system."

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[22] Bullets quoted with slight variation from Kaplan, R. and Miyake, D. "The Balanced Scorecard." *The School Administrator*, 2:67, 2010. http://www.aasa.org/SchoolAdministratorArticle.aspx?id=11784&terms=
[23] Bullets quoted with slight variation from Kaplan, R. and Miyake, D. "Five Things We've Learned About Organizations." *The School Administrator*, 2:67, 2010. http://www.aasa.org/SchoolAdministratorArticle.aspx?id=11672

- **Use it or lose it**. The balanced scorecard only will succeed if it is "ingrained as the central information system for managing the district." The balanced scorecard must adapt to evolving district strategies so that it "remains relevant and adaptable to changes in the environment and new educational opportunities."

SECTION II: BEST PRACTICE DISTRICTS

In this section, we profile three best practice districts that demonstrate three different approaches to the balanced scorecard. The first, Monroe County Public Schools, uses a real-time scorecard model that features color-coding and easy navigation. Meanwhile, Aldine Independent School District releases a quarterly progress report indicating which targets have been met and which have not. Finally, Montgomery County Public Schools does not have a publicly-available scorecard, but it established a user-friendly website to inform the community of its goals and objectives and releases an annual report on progress toward each milestone. This section concludes with examples of nontraditional measures used by other districts.

MONROE COUNTY SCHOOLS (FORSYTH, GEORGIA)

Monroe County Schools (MCS), a district with approximately 4,000 students in central Georgia, has been profiled by the School Superintendents Association (AASA) as a best practice district in using a balanced scorecard to bolster systematic improvement.[24] Scott Cowart, former Superintendent, described the key components, which involved setting "clear expectations for schools, departments and the district through a transparent process for tracking and reporting performance." In addition to the district scorecard, individual schools and departments also created their own scorecards "to track and report their individual performance against district goals." Key components of the process included:[25]

- **Clear and understandable design**: The balanced scorecard used a simple color-coded chart to indicate precisely which schools or departments met expectations and which ones did not. This enabled board members to quickly and accurately form conclusions and reduced misunderstandings between themselves and the superintendent on all areas targeted for improvement. Green coding indicated the targets had been reached; yellow indicated targets had not been met but improvement had been made; and red indicated targets were not reached. The district maximized the balanced scorecard's impact by integrating it with three other tools to develop and support a systemic approach to school improvement: (1) aligned and nested school and district improvement plans; (2) annual reports of progress to the board; and (3) a system for visual reporting of data.

- **Transparency and prominence**: The balanced scorecard was uploaded to the district website to communicate current performance levels to all stakeholders objectively, clearly, and continually. It also was included in presentations to the board, parent groups, and community audiences, and scorecard data were posted in prominent locations in schools, such as teacher work rooms and "data rooms" across the district that were used for meetings and training sessions.

- **Formative process for strategically reviewing performance**: An additional tool to support the balanced scorecard was a formative process for strategically reviewing performance. The district instituted quarterly strategic performance reviews, based on the school,

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[24] Cowart, Op. cit.
[25] Bullets quoted with slight variation from Ibid.

department, and district's balanced scorecards and the connecting improvement plans. These discussions provided sustained focus on improvement progress and needs while providing time for midcourse adjustments. The performance reviews helped by connecting the dots between different school activities and their relationship to the district's strategic direction. In fact, performance reviews often led to the recognition that an action was not aligned to the strategic direction.

MCS' Continuous Improvement Plan for Fiscal Year 2014 is posted on the district website and provides public access to the district's improvement goals and the progress made to date.[26] The figure below illustrates the overall structure of the plan (i.e., the "Map View"), including processes for monitoring progress, assessing performance, and revising the plan.

Who are we?
• Vision
• Mission
• Guiding Principles

Where are we now?
• Performance Data
• Financial Data
• Stakeholder Input
• SWOT Analysis

Where do we want to go?
• Strategic Goals
• Strategic Priority

How will we know when we have arrived?
• Performance
• Objectives
• Measures and Targets

How do we plan to get there?
• Initiatives
• Action Steps

Source: Monroe County Schools

The "Plan Detail" of MCS' balanced scorecard outlines all four strategic goals, as well as the related performance objectives, initiatives, and action steps. For each action step and initiative, the outline uses one of three codes to represent the current status:

○ - Not Started ◐ - In Progress ● - Completed
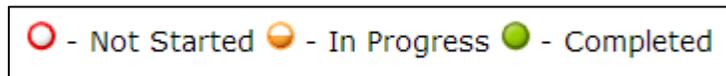
Source: Monroe County Schools

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[26] "Monroe County Schools Continuous Improvement Plan FY 14." Monroe County Schools. Accessed October 24, 2013. http://eboard.eboardsolutions.com/StrategicPlan/MapView.aspx?S=4117&PID=2474

In addition, the "Datasheet View" provides the status, due date, costs, department/group, person responsible, priority level, year addressed, start date, date approved, and completion date for all items included in the outline. A sample screenshot is provided below.

Source: Monroe County Schools

The "Balanced Scorecard" section examines individual performance measures for each performance objective, indicating the ultimate target and annual targets and actual percentages for 2010 through 2013. As described by Cowart, the balanced scorecard uses color coding: red indicates "no change or declined;" yellow indicates "progress but did not meet;" and green indicates "meets or exceeds." A sample screenshot for several performance measures within a performance objective related to the strategic goal of "Attaining High Student Achievement and Success" appears below.

Source: Monroe County Schools

Below is a skeletal outline of the strategic goals, performance objectives, and initiatives included in MCS' balanced scorecard.[27]

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[27] Bullets quoted verbatim from Ibid.

- **Strategic Goal I: Attaining High Student Achievement and Success**
  o Performance Objective A: A system is present for managing and facilitating student achievement and learning based upon consensus-driven content and performance standards.
    - Initiative i: The curriculum is sequenced and organized to ensure students know, do, and understand the core content outlined in the CCGPS (Reading, English Language Arts, Math) and GPS (Science, Social Studies).
    - Initiative ii: Teachers engage in a process of collaborative planning for curriculum implementation to ensure that they agree on core content and required student performance(s).
    - Initiative iii: Teachers and administrators use a systematic process for monitoring and evaluating implementation of the curriculum.
  o Performance Objective B: Collect and analyze student performance data to identify patterns of achievement and underachievement in order to design and implement appropriate instructional interventions.
    - Initiative i: A cohesive and comprehensive system is in place to ensure that all administrators and instructional personnel use assessment data to design and adjust instruction to maximize student achievement.
    - Initiative ii: A variety of effective and balanced assessment techniques is routinely and systematically implemented by all instructional personnel as part of a comprehensive school-based assessment and evaluation system.
    - Initiative iii: Assessment and evaluation data are analyzed to plan for continuous improvement for each student, subgroup of students, and the school as a whole.
  o Performance Objective C: Designing and implementing teaching - learning - assessment tasks and activities to ensure that all students achieve proficiency relative to the Common Core Georgia Performance Standards (CCGPS) and Georgia Performance Standards (GPS).
    - Initiative i: Instructional design and implementation are clearly and consistently aligned with CCGPS/GPS and district expectations for learning.
    - Initiative ii: Research-based instruction is standard practice
    - Initiative iii: High expectations for all learners are consistently evident, with students playing an active role in setting personal learning goal and monitoring their own progress based upon clear evaluation criteria.

- **Strategic Goal II: Developing Organizational Effectiveness**
  o Performance Objective A: The processes, procedures, structures, and products that focus the operations of a school on ensuring attainment of standards and high levels of learning for all students.
    - Initiative i: A current school vision and mission are the basis for all aspects of continuous improvement. All stakeholders within the learning community have achieved consensus regarding their shared sense of vision and mission, which serves as the basis for all facets of the continuous improvement process.
    - Initiative ii: A comprehensive planning process results in a current school improvement plan to guide the continuous improvement process for the school.

- Initiative iii: Collaborative planning involving the district and the school is present in all aspects of fiscal management and resource distribution. This process reinforces the ability of the school to achieve its articulated continuous improvement goals, including ensuring the academic success of all learners.
- Initiative iv: All staff work collaboratively to ensure that rules, policies, and procedures related to sustaining a safe, productive, and inviting learning environment are clearly articulated, effectively communicated, and successfully and consistently implemented throughout the school.
- Initiative v: Maintain SACS Accreditation.

- **Strategic Goal III: Ensuring Student/Stakeholder Engagement and Loyalty**
  o Performance Objective A: The school as a community of learning involves parents and community members as active participants. There is consistent and growing evidence of parental involvement and volunteerism, participation in workshops and enrichment activities, and a process of two-way communication. Everyone collaborates to help the school achieve its continuous improvement targets and short- and long-range goals.
    - Initiative i: The school reinforces the continuous improvement process through active and sustained involvement of student, family, and community.
    - Initiative ii: The school has organizational structures and processes to ensure that students, families, and community members play an active and sustained role in school governance, decision-making, and problem-solving.
    - Initiative iii: The school addresses student, family, and community needs through appropriate services and cross-institutional partnerships.
    - Initiative iv: Conduct school & grade orientations, curriculum nights, and learning/leadership academy experiences for the students & their families.

- **Strategic Goal IV: Professional Learning**
  o Performance Objective A: Professional learning is the means by which teachers, administrators and other school and system employees acquire, enhance and refine the knowledge, skills, and commitment necessary to create and support high levels of learning for all students.
    - Initiative i: The context of professional learning--the who, when, why and where--contributes to the development and quality of learning communities, ensuring that they are functioning, leadership is skillful and focused on continuous improvement, and resources have been allocated to support adult learning and collaboration.
    - Initiative ii: The process - the how - of professional learning is aligned with articulated goals and purposes, data-driven, research-based, evaluated to determine its impact, aligned with adult learning theory, and collaborative in design and implementation.
    - Initiative iii: The content - the what - of professional learning reinforces educators' understanding and use of strategies for promoting equity and high expectations for all students, application of research-based teaching strategies and assessment processes, and involvement of families and other stakeholders in promoting student learning.
    - Initiative iv: Provide training in interventions to address at-risk based issues.

ALDINE INDEPENDENT SCHOOL DISTRICT (HOUSTON, TEXAS)

Aldine Independent School District (ISD) was a 2008 finalist for the Broad Prize for Urban Education in recognition of efforts to improve district performance using a balanced scorecard. The Broad Foundation's profile of Aldine ISD describes key strategies used by the district to "help teachers, principals, district staff and top administrators focus strategically on programs and instructional practices that directly contribute to improved student learning."[28] The district cites the use of balanced scorecards for allowing it to focus "on goals that matter most to the Aldine community and enabling them to make critical mid-course adjustments to sustain student achievement." The main strategies are as follows:[29]

- **Aligning performance management tools with district-wide goals.** Each of Aldine's goals is captured in a district-wide balanced scorecard that empowers district leaders to analyze performance and adjust their strategies on an ongoing basis. District-wide goals then cascade down to individual district departments, pre-K-12 feeder patterns, individual schools and—in some cases—even teachers and students, to form their objectives for the current school year. Principals set school scorecard goals for data points such as attendance, student performance, staff development, and parental involvement. Some department and school goals are unique to particular programs, while others—such as student achievement and attendance—are based on overall district targets. Aldine relies largely on site-based decision-making, which allows each school to pursue its targets in a unique way.

- **Monitoring and revising performance plans on an ongoing basis.** Leaders and staff in Aldine review and revise their goals and strategies throughout the year to ensure that they reflect the most up-to-date student achievement data. Every quarter, principals, area superintendents, and central office staff set performance goals and review their scorecards. The scorecard then enables them to monitor their progress and redirect staff, resources, or activities to serve the district's key objectives if they have exceeded expectations or veered off track. This approach reflects the district's belief that strategic planning should include both a long-term district-wide view and a short-term cycle of planning, action, and reflection.

- **Using performance plans to guide evaluations, support, and rewards.** Leaders at all levels of the district are evaluated on the scorecard performance of the school or unit they oversee. Together with parental surveys, scorecards form the basis of principals' annual evaluations. Those components provide supervisors with a complete picture of the school. Principals' professional development is aligned with the goals on their personal scorecards as well. Every principal has access to comparative data showing the performance of their school with other schools across the district. Area superintendents are evaluated using the scorecard for their K-12 feeder patterns as well as their performance across the district-wide scorecard.

The process of implementing Aldine ISD's balanced scorecard involved reflection on weaknesses and analysis of needs and priorities. In 2000, all departments and district leaders participated in an exercise to identify all issues of importance within the work environment. This exercise informed the district's new vision, mission, and belief

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[28] "Eye on the Prize: The Road to Broad." The Broad Prize for Urban Education, March 2009.
http://www.broadprize.org/newsletter/March2009/index.html
[29] Bullets quoted with slight variation from Ibid.

statements. By fall 2001, every department had developed an action plan and scorecard to address the district's new objectives and goals. The balanced scorecard was implemented later that year.[30]

Aldine ISD's scorecard is updated quarterly in a PDF file posted to the district website.[31] For each objective, the scorecard lists the supporting actions/tasks and the related measures. For each measure, targets and actual performance across three years of data are reported. A screenshot of information provided for the first objective is shown below.

													3 Year Trend		
Objective 1: Aldine Independent School District will demonstrate sustained growth in student achievement															
Action/Task	**Measure**	**1 Year Target**	**Actual Q1**	**Var.**	**Actual Q2**	**Var.**	**Actual Q3**	**Var.**	**Actual Q4**	**Var.**	**3 yr Target**	**Year Added**	**11-12**	**10-11**	**09-10**
1.1 Improve, sustain, and Support Academic Student Performance at or AboveGrade Level															
Increase LEP student achievement in reading, math science, and all tests.	*Benchmark Tests*														
	•Reading	90%			44.63%	-45.37%	27.8%	-62.2%			90%	10-11	57%	51.3%	
	•Math	90%			64.5%	-25.5%	50.2%	-39.8%			90%	10-11	77%	67.6%	
	•Science	90%			70.85%	-19.15%	66.3%	-23.7%			90%	10-11	85%	73.9%	
Increase SpEd student achievement in Rdg, MA Sci., and all tests.	*Benchmark Tests*														
	•Reading	90%			45.28%	-44.72%	9.1%	-80.9%			90%	10-11	32%	26.3%	
	•Math	90%			51.28%	-38.72%	24.5%	-65.5%			90%	10-11	39%	38.3%	
	•Science	90%			59.63%	-30.37%	40.3%	-49.7%			90%	10-11	49%	45.6%	
Monitor students in Dyslexia prog.	Number of students being served in the Dyslexia Program.	1,065	1,781	+716	1,853	+788	2,302	+1,237			BL	11-12	2,003	1,065	
Increase proficiency of TELPAS scoring	Provide training to improve TELPAS scoring in relation to writing and oral language	≥2	2	0			2	0			≥2	11-12	2		

Source: Aldine Independent School District

Aldine ISD uses minimal color-coding in its scorecard. Under the "Var." heading, figures in red font indicate a negative difference between the target and actual performance, while figures in blue font indicate a positive difference. An outline of district objectives is provided below.[32]

Objective 1: Aldine ISD will demonstrate sustained growth in student achievement.
1.1 Improve, sustain, and support academic student performance at or above grade level
1.2 Increase number of students who are college and career ready
1.3 Expand the use of technology to deliver state-of-the-art classroom instruction and global access to information
1.4 Develop leadership capacity
1.5 Implement, monitor, and adjust the highly qualified component of the human resources plan
1.6 Reform the appraisal system to evaluate and recognize teacher effectiveness
1.7 Improve employee attendance
1.8 Develop intervention strategies to improve graduation/completion/drop-out and student attendance rates

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[30] "AISD's Continuous Improvement Journey." Aldine Independent School District.
http://www.aldine.k12.tx.us/cms/documents/AISDJourney.pdf
[31] "District Scorecards." Aldine Independent School District. Accessed October 24, 2013.
http://www.aldine.k12.tx.us/cms/rise/main.cfm?siteID=121&PageID=1826
[32] Bullets quoted with slight variation from "2012-2013 Balanced Scorecard Q3." Aldine Independent School District.
http://www.aldine.k12.tx.us/cms/file_process/download.cfm?docID=46A6D279B644792B

1.9 Provide professional development to improve student achievement and job performance
1.10 Address student health needs through School Health Advisory Council
1.11 Establish and revise board and administrative policies based on new laws

Objective 2: Aldine ISD will implement effective student management strategies to improve student behavior.
2.1 Implement an effective student management framework which emphasizes positive behavior interventions and support
2.2 Provide quality staff training and professional development addressing effective student management strategies
2.3 Monitor district processes, drills, and strategies that increase security of and safety of district facilities and campuses
2.4 Establish and revise board and administrative policies based on new laws

Objective 3: Aldine ISD will improve parent/community relations by creating a welcoming environment in all campuses/facilities/departments.
3.1 Increase and improve communication with parents
3.2 Ensure all levels of stakeholders are informed of and understand the 2012 Tax Ratification Election
3.3 Increase student, staff, parent, and community satisfaction by providing positive customer service in a welcoming atmosphere within all campuses, facilities, and departments
3.4 Select a marketing firm to assist in promoting and publicizing positive features of Aldine ISD to the general public and district stakeholders
3.5 Establish board and administrative policies based on new laws

Objective 4: Aldine ISD will maintain fiscal solvency and align priorities to support critical educational programs, by applying sound financial principles and practices.
4.1 Ensure fiscal policies of the district promote and support critical educational programs
4.2 Improve finance and budgeting knowledge and skills for district departments and campuses
4.3 Implement sound financial planning, principles, and practices to ensure fiscal solvency
4.4 Establish board and administrative policies based on new laws

Objective 5: Aldine ISD will manage district operations and assets in an efficient manner.
5.1 Optimize key work processes within district operations to ensure efficiency and effectiveness
5.2 Monitor budget control
5.3 Establish and revise board and administrative policies based on new laws

MONTGOMERY COUNTY PUBLIC SCHOOLS (ROCKVILLE, MARYLAND)

Montgomery County Public Schools (MCPS), a district of nearly 150,000 students, was a 2010 recipient of the Baldrige Award in the Education category.[33] Behind the district's improvement efforts is the strategic plan, entitled "Our Call to Action: Pursuit of Excellence." The plan includes five main goals along with several milestones (objectives) and data points. The district updates the plan annually and releases a report assessing progress toward the goals and objectives each year.[34] Rather than making a data-only scorecard available on the district website, the annual report reviews all data points and demonstrates progress over the past three years.

In addition to the publicly-available annual report, MCPS provides information on improvement efforts on a website dedicated to the district's strategic planning framework. This website focuses on indicators related to student performance and lists objectives for students as well as staff.[35]

The goals, milestones, and selected data points listed in the MCPS strategic plan are as follows:[36]

Goal 1: Ensure success for every student.

- All students will achieve or exceed proficiency standards in mathematics, reading, writing, science, and government on local and state assessments.
  - o Data points: state accountability and assessments; Measure of Academic Progress-Reading (MAP-R); ACCESS for ELLs

- All students will successfully complete Algebra by the end of Grade 9 and geometry by the end of Grade 10.
  - o Data points: Algebra successful course completion with a "C" or higher by the end of grade 8, 9, or 10

- All students will successfully complete Algebra 2 by the end of grade 11.
  - o Data points: Algebra 2 completion with a "C" or higher by the end of grade 11

- All schools will increase participation and performance of all students taking the SAT/ACT.
  - o Data points: PSAT participation; SAT/ACT participation and performance

- All schools will eliminate the disproportionate suspension rate of African American and Hispanic students, and students receiving special education services.
  - o Data points: suspension data; ineligibility for extracurricular activities

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[33] "Baldrige Award Recipients' Contacts and Profiles." NIST Baldrige Performance Excellence Program. http://www.baldrige.nist.gov/Contacts_Profiles.htm

[34] "Malcolm Baldrige National Quality Award: Montgomery County Public Schools." NIST Baldrige Performance Excellence Program. http://www.nist.gov/baldrige/award_recipients/mcps_profile.cfm

[35] "The Strategic Planning Framework." Montgomery County Public Schools. http://montgomeryschoolsmd.org/framework/

[36] Bullets quoted with slight variation from "Annual Report on Our Call to Action." Montgomery County Public Schools, 2012. http://www.montgomeryschoolsmd.org/uploadedfiles/about/strategicplan/annualreport/Annual-Report-2012-0122.pdf

- All students will be educated in learning environments that are safe, drug-free, and conducive to learning.
    o <u>Data points</u>: student, parent, and staff survey results

- All schools will meet or exceed the state's graduation requirements.
    o <u>Data points</u>: graduation and dropout rates

- All graduates will be prepared for postsecondary education and employment.
    o <u>Data points</u>: University System of Maryland requirements; completion of career and technology education program

Goal 2: Provide an effective instructional program.

- All students will acquire the essential skills and knowledge to meet or exceed standards in reading and mathematics by the end of Grade 2.
    o <u>Data points</u>: enrollment in prekindergarten; TerraNova 2 in grade 2; MCPS assessment program in primary reading (kindergarten to grade 2)

- All schools will increase enrollment and performance of all students in gifted, Honors, Advanced Placement, International Baccalaureate, and other college-level courses, with a focus on improving enrollment and performance of Black or African American and Hispanic/Latino students.
    o <u>Data points</u>: gifted and talented screening (grade 2); advanced mathematics in grade 5 proficiency; Honors, Advanced Placement, International Baccalaureate, and other college-level course enrollment; AP/IB exam participation and performance

- MCPS will eliminate the disproportionate representation of Black or African American and Hispanic/Latino students in special education.
    o <u>Data points</u>: students receiving special education services

- All schools will provide students with disabilities access to the general education environment, to the maximum extent appropriate.
    o <u>Data points</u>: special education students receiving services in general education

- All schools will achieve or exceed local and state standards for attendance.
    o <u>Data points</u>: attendance rate

Goal 3: Strengthen productive partnerships for education

- The district and local schools welcome all families as active partners in the school community.
    o <u>Data points</u>: parent satisfaction survey results; participation at system-wide *Ask MCPS* events; system-wide workshops offered in languages other than English

- The district and local schools engage in regular, two-way communication with families about the district's educational program and student learning.
    o <u>Data points</u>: evaluation of system-wide parent workshops and meetings; system-wide communication systems that keep parents informed

- The district and local schools collaborate with all families to support student academic success and healthy development by providing regular opportunities to strengthen their knowledge and skills to do so effectively.
  o Data points: participation in system-wide parent workshops to support student success; participation in local school parent workshops to support student success

- The district and local schools encourage all families to advocate for their children to ensure that students are treated fairly and have access to learning opportunities that will support their success.
  o Data points: participation in school-based study circles; participation in system-wide parent advocacy workshops; participation in school-based parent advocacy workshops

- The district and local schools will seek and utilize stakeholder input to inform, influence, and create policies, practices, and programs, including full engagement in the school improvement process.
  o Data points: participation on board of education and system-wide work groups and advisory committees; parent participation on school improvement teams

- The district and local schools will collaborate with community members to connect students, families, and staff to expand learning opportunities, community services, and civic participation for a broad array of MCPS stakeholders.
  o Data points: district and local school partnership data; district-wide parent and community volunteer hours

Goal 4: Create a positive work environment in a self-renewing organization.

- All employees will be provided with high-quality professional development opportunities to promote individual and organizational effectiveness.
  o Data points: teacher professional growth system data; administrative and supervisory professional growth system data; supporting services professional growth system data; staff who receive high-quality professional development

- Systems are in place to recruit, support, and retain highly qualified and diverse professional and support personnel.
  o Data points: diversity in workforce; highly qualified teachers; highly qualified paraeducators

- All offices and departments have strategic plans that are aligned with *Our Call to Action: Pursuit of Excellence*.
  o Data points: office and department strategic plans

- All schools develop school improvement plans that address the needs of all *No Child Left Behind* subgroups using the Baldrige-guided School Improvement Planning Process.
  o Data points: school improvement plans

- The work environment promotes employee well-being, satisfaction and, positive morale.
  o Data points: staff survey data on school and office environment

- MCPS recognizes staff efforts and achievement in pursuit of system goals and related priorities.
  o <u>Data points</u>: employee recognition data

Goal 5: Provide high-quality business services that are essential to the educational success of students.

- All business services will meet or exceed customers' needs, requirements, and reasonable expectations.
  o <u>Data points</u>: customer results

- Systems are in place to recruit, support, and retain highly qualified business services personnel.
  o <u>Data points</u>: human resources results

- All business functions plan, develop, secure, and effectively manage fiscal resources in compliance with internal and external accountability requirements to support the education of students.
  o <u>Data points</u>: financial results

- All business functions effectively and efficiently deliver the highest quality products, resources, and business services essential to the educational success of students.
  o <u>Data points</u>: organizational results

EXAMPLE MEASURES

Below, we provide examples of measures used by districts for objectives with less obvious links to data or evidence. As shown, for many objectives not clearly tied to student achievement, financial data, or other more obvious measures of district performance, specific items on stakeholder surveys (e.g., student or staff surveys) are often used to provide evidence of a variety of outcomes.

Fort Wayne Community Schools – Fort Wayne, Indiana[37]

- Parent/Family Engagement
  o Percentage of students whose parents/guardians participate in at least one parent/teacher conference

- Community Engagement/Public Confidence
  o Number of district-approved volunteers and mentors participating in our schools through community programs
  o Percentage of students leaving and using the voucher system
  o Number and percentage of students returning to Fort Wayne Community Schools after count day

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[37] "2012-2013 Balanced Scorecard." Fort Wayne Community Schools. http://fwcs.k12.in.us/files/bsc_district_1213.pdf

Western Dubuque Community School District – Farley, Iowa[38]

- Student Satisfaction
  - Increase percentage of students satisfied with school as measured by the bi-annual student satisfaction survey
  - Increase percentage of students feeling safe at school based off student survey

- Student participation
  - Increase percentage of secondary student subgroups participating in extracurricular activities

- Community Satisfaction
  - Increase percentage of community satisfaction with school as measured by satisfaction survey

- Parent Involvement
  - Increase percentage of parents attending parent teacher conferences
  - Increase number of logins on the parent portal
  - Increase two-way communication between school and home through a variety of methods as measured through parent survey

- Community Partnerships
  - Increase the net gain of open enrollment students (in/out)
  - Increase number of reported instructional support volunteer hours

Mt. Lebanon School District: Pittsburgh, Pennsylvania[39]

- Communication Skills Standards: Mt. Lebanon students master district communication skills standards
  - Grade 11 PSSA Writing Assessment

- Working Cooperatively: Mt. Lebanon students demonstrate the ability to work cooperatively with diverse groups of students on assigned schoolwork, resolve conflicts, and respect other cultures and beliefs.
  - Graduate Survey: Rate high school preparation to work cooperatively with others
  - Graduate Survey: Rate high school preparation to resolve conflicts

- Problem Solving: Mt. Lebanon students apply problem solving strategies to solve problems
  - Graduate Survey: Rate high school preparation in problem solving/thinking skills for your future

- Responsible for Learning and Quality Work: Mt. Lebanon students show responsibility for their own learning and demonstrate the discipline necessary to do quality work
  - Attendance
  - Grade 12 GPA
  - Behavior

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[38] "District Balanced Scorecard: 2012-2013." Western Dubuque Community School District. http://www.w-dubuque.k12.ia.us/?PN=Pages&SubP=Level1Page&L=1&DivisionID=8646&PageID=13218&ToggleSideNav=ShowAll

[39] "Mt. Lebanon School District Balanced Scorecard." Mt. Lebanon School District. Accessed October 25, 2013. http://www.mtlsd.org/bsc/default.asp

- Student Satisfaction: Students feel respected, connected, and valued members of the school community
  - Graduate Survey: Were you treated with respect at Mt. Lebanon High School?
  - Graduate Survey: Were you a connected member of Mt. Lebanon High School?
  - Graduate Survey: Were you a valued member of Mt. Lebanon High School?

Burke County Public School System: Waynesboro, Georgia[40]

- Improve school climate
  - Our school provides a safe learning environment: average score on parent survey
  - All staff members are attentive to the needs of all of our young students: average score on staff survey
  - My school makes sure at least one adult knows me well and shows interest in my education and future: average score on student survey

- Ensure our school climate promotes students feeling safe and successful at school
  - I am safe at school: student survey (early elementary)
  - I feel safe at school: average number of 6th, 8th, 10th, and 12th graders who respond "strongly agree" or "agree"
  - I feel successful at school: average number of 6th, 8th, 10th, and 12th graders who respond "strongly agree" or "agree"

- Promote a collaborative organizational culture
  - Monthly collaborative meeting: percentage of agenda items aligned to our four goal areas

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[40] "Burke County Public Schools Balanced Scorecard." Burke County Public Schools.
http://www.burke.k12.ga.us/education/page/download.php?fileinfo=QlNDXzMuMjEuMjAxMy5wZGY6Ojovd3d3N
i9zY2hvb2xzL2dhL2J1cmtlY291bnR5L2ltYWdlcy9hdHRhY2gvMjIxMzUuMjgyOTJfMjIxMzVfYXR0YWNoczU5NDYucG
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