



Public Schools of North Carolina

Strategic Goals and Accountability: Measuring What Matters

November 17, 2015



Today's Goal and Objectives

- Write one Specific, Measurable, Attainable, Relevant, and Time-bound goal for your organization.
- Discuss key terms of goal writing, setting clear benchmarks, developing an accountability plan, and tools to support the accountability plan.





What is one goal that you can take back with you?

- Remember to be Specific.



How does an organization achieve success?

An organization achieves success in its goals and excellence in its operations not by good fortune or hard work, but by focused effort on the right things.

- Academic Excellence
- Fiscal Vitality
- Legal Compliance
- Board Effectiveness
- School Improvement





What strategy can help a board be successful?

- Achieving your vision, mission, and your strategic goals and objectives.
- Clearly defining those goals and objectives with a completion timeline in which they will be achieved.
- Focusing on the strategic plan not the tactical.





Strategic Goals

- Though the strategic goal is not the first component of the strategic planning process, it is the endpoint that planners are ultimately trying to reach.
- Strategic goals directly identify what the organization sees as the outcome of their intended efforts.
- It is the Board's job to figure out what the school is to accomplish and "how well" it is to be accomplished.





Who should be part of this process?

Academic Excellence	Fiscal Vitality	Legal Compliance	Board Effectiveness	School Improvement
Board Member	Board Member	Board Member	Board Member	Board Member
School Leader	School Leader	School Leader	School Leader	School Leader
Teachers	Teachers		Teachers	Teachers
Stakeholders	Stakeholders	Stakeholders	Stakeholders	Stakeholders
Critical Friend	Financial Advisor/auditor	School's Attorney	Critical Friend	

- Stakeholder: Parents and/or Community members
- Critical Friend: Third party with specific expertise





What should the board remember?

Three things the board should evaluate each year...

- 1.Process towards charter renewal
- 2.Performance of the school leader
- 3.Performance of the board



- Highly recommended that the strategic goals developed are aligned with this in mind.





Measurement

- “Measurement is the first step that leads to CONTROL and eventually to IMPROVEMENT.”
- If you can’t measure something, you can’t understand it. If you can’t understand it, you can’t control it. If you can’t control it, you can’t improve it.”- H. James Harrington at IBM





Key Terms

- Measure (how we know) - Quantifiable representations of activities performed by a department, program or unit in pursuit of an objective. Typical measurement categories include outcomes, outputs, efficiency, and productivity.
 - Quarterly assessment results on reading comprehension growth.
 - Minutes of individualized remediation per bottom quartile student.





What Is A Good Measure?

Measure Characteristic	Main Concern
Understandable	<ul style="list-style-type: none">• Can the performance measure be easily and clearly communicated?
Controllable	<ul style="list-style-type: none">• Can the results be controlled or significantly influenced under a designated span of control?
Actionable	<ul style="list-style-type: none">• Can action be taken to improve performance?
Credible	<ul style="list-style-type: none">• Is the performance measure resistant to manipulation?



What are some Key Terms?

- Baseline (how much) – the initial level of performance of a performance measure against which future improvements will be compared.
 - Existing available data reflecting current level of performance for related measures.
 - Serves as a starting point for reaching target levels of performance.
 - Caution: A baseline is not always at “standard”.
 - A baseline may be below standard.
 - Make sure your baseline data has integrity.





Key Terms

- Goal/Deliverable: A broad statement that describes a desired outcome for a department, program, or unit. The desired outcome establishes the organizations long-term priorities and influences the development of short-term objectives.
 - Earn Honor School of Excellence recognition.
 - Obtain a facility.
 - A student enrollment of 1,000 students.





Key Terms

- Objective (Specific Action): A measurable statement that supports the attainment of the associated goal accomplished in a given time.
 - Evaluate the overall instructional program through a third party.
 - Hire a real estate agent to find facilities that meet our criteria by March, 2014.
 - Survey the local communities on their knowledge of the charter school's mission, education plan, and enrollment procedures and why they have not chosen to apply.





Key Terms


- Target: (how much) – the desired level of performance of a performance measure at specified period of time that provides direction for action, represents continuous improvement and motivates employees down the stretch of an objective.
 - 80% Proficiency and high academic growth
 - 150 additional minutes of additional reading instruction per week.
 - Determine near-term targets and long-term targets and review them quarterly to annually.
 - Ask “would I be proud of results?”
 - Ask “would I bet on the end result?” (Attainable)
 - Ask “will I be able to sell my stakeholders on this target?”





Do You Have Any Key Term Questions?






Lets add a Measurable part to your original goal.



Measure (how we know) - Quantifiable representations of activities performed by a department, program or unit in pursuit of an objective. Typical measurement categories include outcomes, outputs, efficiency, and productivity.





Lets add an Attainable part to your original goal.

- Is your goal Attainable?



Objective (Specific Action): A measurable statement that supports the attainment of the associated goal accomplished in a given time.

Accountability begins and ends with
the governing board!





Accountability: Two Questions

1. How many times in the past 12 months, *according to your minutes*, did the board measure how well the organization is achieving the intended outcomes in the initial charter application?





Accountability: Two Questions

2. When was the last time the full board formally measured (i.e., as an agenda item) the school's progress toward achieving the student outcomes stated in the charter?





Determine acceptable evidence

- In strategic goal development (Accountability) the backward design model suggests that developers think about the acceptable evidences and benchmarks timelines to monitor progress.
 - How will we know if the organization has achieved the desired results?
 - What will we accept as evidence of this achievement? How will this evidence be tracked?
 - Who is responsible for collecting this data and how often will it be reported?



What is the Balanced Scorecard?

- This approach to strategic management was developed in the early 1990's by Doctors Robert Kaplan (Harvard Business School) and David Norton.
- Recognizing some of the weaknesses and vagueness of management approaches, the balanced scorecard approach provides a clear prescription as to what organizations should measure in order to “balance” the overall perspective.





Balanced Scorecard Option

- The balanced scorecard is a *management system* (not only a measurement system) that enables organizations to clarify their vision and strategy and translate them into action.
- It **provides feedback** around both the internal business processes and external outcomes in order to continuously improve strategic performance and results.
- When fully deployed, the balanced scorecard **transforms strategic planning** from an academic exercise into the nerve center of an enterprise.





What do we look for in the Balanced Scorecard?

- Is the “what” clearly defined (mission, vision, goals and objectives)?
- Is the “how” defined (strategies and projects)?
- Is it clear “how you know” whether the “what” is being accomplished (measures and targets)?
- Is it balanced (across 4 quadrants with leading and lagging indicators)?

The balanced scorecard is driven by a Strategic Calendar!

Center for Educational Leadership and Technology (CELT) 2009





Why use a Balanced Scorecard?

- It focuses efforts and enhances alignment
- Identifies any efforts that are not strategic
- Helps eliminate unnecessary work
- Enhances leadership capacity and management
- Facilitates communication of progress, needs, and challenges
- Focuses everyone on results
- Encourages continuous improvement





It's About Execution

1. Once a scorecard is developed and the projects are identified – the next important thing is execution – using a proven project management process to scope, sequence, assign and track the work.
2. It is also important to build the budget to support the projects – so there is continuity from strategic planning to budgeting.
3. Ultimately, individual performance appraisals (and compensation) could and should be driven by the Balanced Score Card.
4. Needs to focus on performance management.



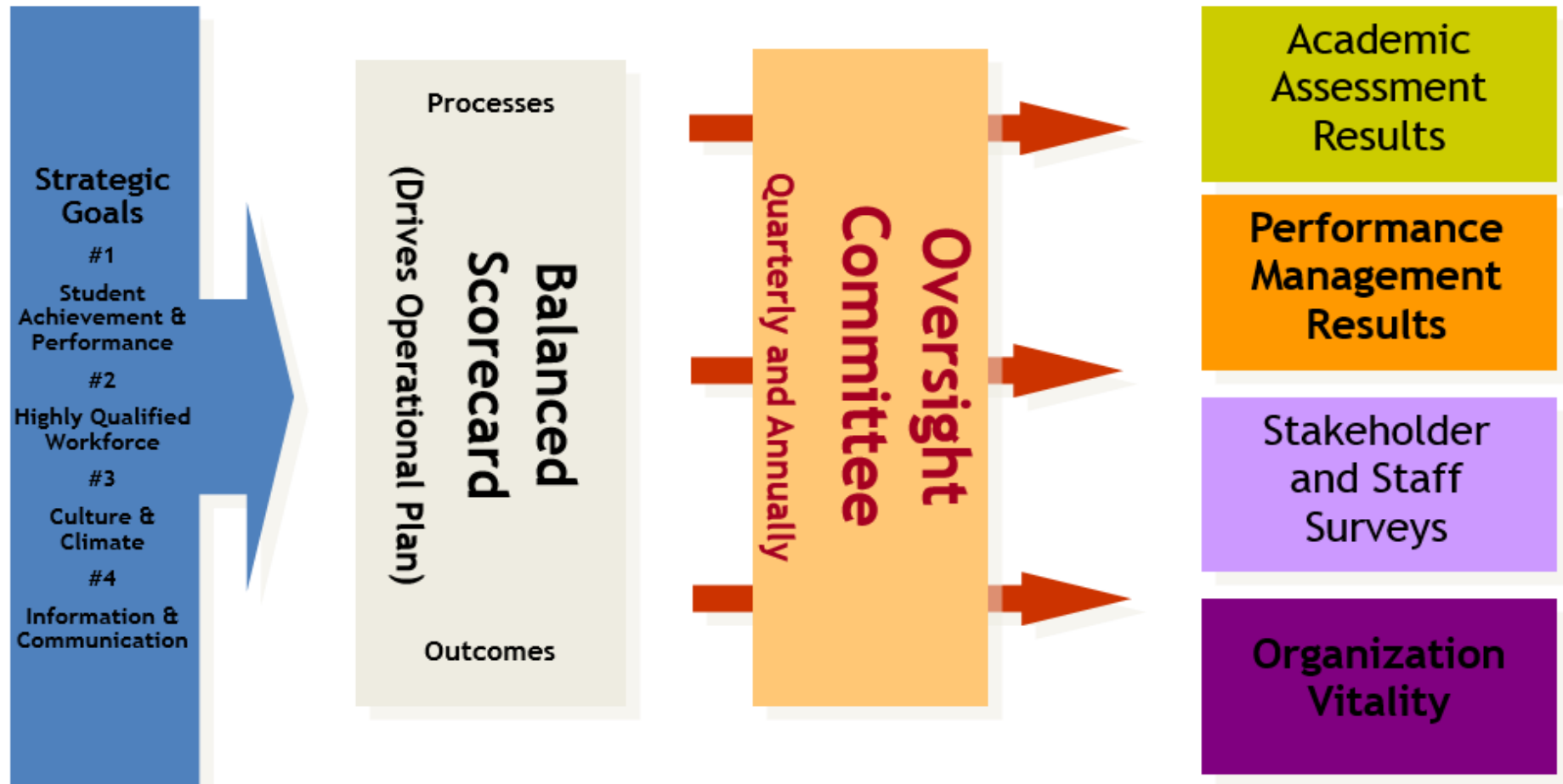
It's About Execution

WHAT?

HOW?

Who & When?

Monitor





Oversight Committee

- The plan is not in addition to the work - it should define the work.
- Deliverables are nouns.
- Spread deliverables/milestones throughout the year, don't bunch them around June 30.
- Try to have some milestones due each month.
- Use the change control process.





Oversight Committee Results

- Ensure measures are **Understandable, Controllable, Actionable and Credible**
- Disseminate and analyze formative and summative data on the school's goals
 - Support the lead administrator with action plans (if needed)
- Support the board in developing policies to strengthen governance oversight.
- Help the board SHOUT OUT superior results to anyone who will listen.





3 Keys to Accountability

- **Consistency** – “meet regularly”
- **Honesty** –be transparent with each other.
- **Intentionality** –be intentional and build a relationship of trust.





- Is your goal Relevant, and Time-bound goal for your organization?





S.M.A.R.T. Goals

- Specific: A specific goal has a much greater chance of being accomplished than a general goal. (Student Enrollment increase)
- Measurable: A clear criteria for measuring progress toward attainment of each goal set should be established. (**Principal Monthly Report: PMR**)
- Attainable: Goals that are important to the organization are easy to figure out how to make them come true. (**Recruitment of students from surrounding care centers we can add 25 students.**)
- Realistic: Realistic goals represent an objective which the organization is both willing and able to work towards accomplishing. (**September 2016 reaches 275 students**)
- Time Bound: A goal should be time bound. Deadlines too far in the future are easy to put off, goals set too close together tend to be unrealistic and have little success.

(According to the September 2017 PMR, the school's overall student enrollment in grades K-8 will be at a minimum of 300 students.)





What are these SMART goals lacking?

1. To improve on the skills learned in grades K-2, grades 3-5 will focus on reading complex text fluently with strong comprehension.
2. Grades 3-5 will perfect their writing using a myriad of skills such as capitalization, punctuation, appropriate word choices, and spelling.
3. Arts Education will produce artists who are disciplined to work towards a craft with exceptional skill possessing qualities of creative problem solving, production and presentation through principles of design.





S.M.A.R.T. Activity

Specific-what, where, who, which

Measurable- quantity, quality, cost

Attainable-Reasonable, controllable, resources
available, achievable

Relevant-why this, why now, alignment

Time-bound-when, scheduling, timelines, helps
motivate





What we accomplished today...

- We identified SMART Goals
- You developed one new SMART goal for your organization
- We discussed:
 - Basics and key terms of goal writing
 - Setting clear benchmarks
 - Developing an Accountability plan
 - Introduced the Balanced Score Card





Questions?



Accountability breeds response-ability.
Stephen Covey

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