

Balanced Performance Improvement Series:

**Developing Increased Parent
Engagement in Schools Using
the Balanced Scorecard**



Georgia Leadership Institute
for School Improvement

**A Performance-based Learning Module
for Georgia's Educational Leaders**

Related Modules

Module Series

This **Balanced Performance Improvement Series** includes:

- *Leading a Team to Develop Performance Foundations**
- *Leading a Team to Select Performance Measures**
- *Leading a Team to Develop Strategy Maps**
- *Leading a Team to Develop a Balanced Scorecard**
- *Leading the Cascading of the Balanced Scorecard**
- *Leading a Team through Process Improvement and Process Mapping**
- *Leading a Team to Allocate Resources Using the Balanced Scorecard*
- *Leading a School through SACS Accreditation Using the Balanced Scorecard*
- *Leading a District through SACS Accreditation Using the Balanced Scorecard*
- *Developing Increased Parent Engagement in Schools Using the Balanced Scorecard*
- *Developing Increased Parent Engagement in Districts Using the Balanced Scorecard*
- *Leading a Team to Implement Visual Reporting*
- *Developing a Performance Leadership Handbook*

*Prerequisite modules — Complete prior to beginning this module.

Contents

| | |
|---|-----------|
| Related Modules | 2 |
| Contents | 3 |
| Progress Tracker | 4 |
| Performance Objective(s)..... | 5 |
| Module Introduction | 6 |
| Topic 1: Refining Objectives | 9 |
| Topic 2: Updating the Balanced Scorecard | 17 |
| Final Practice | 24 |
| Final Assessment | 35 |
| Appendix A: Balanced Scorecard Performance Measure Dictionary..... | 43 |
| Appendix B: Balanced Scorecard Template | 45 |
| Recommended Reading and Resources | 48 |
| Acknowledgments | 49 |

Progress Tracker

| | | Completed | Date |
|------------------------|--|--------------------------|-------|
| Preparing | Review Performance Objective | <input type="checkbox"/> | _____ |
| | ↓ | | |
| | Review Final Assessment* | <input type="checkbox"/> | _____ |
| | ↓ | | |
| Learning | Topic 1: Refining Objectives | <input type="checkbox"/> | _____ |
| | ↓ | | |
| | Topic 2: Updating the Balanced Scorecard | <input type="checkbox"/> | _____ |
| | ↓ | | |
| Practice (Safe) | Final Practice | <input type="checkbox"/> | _____ |
| | ↓ | | |
| Performing | Final Assessment | <input type="checkbox"/> | _____ |

(See note below*)

* You may proceed to the Final Assessment if you are already proficient in the required knowledge, skills, and behaviors.

| Module Completed – Congratulations on Your Performance!** | |
|---|--------------------------------|
| Date of Final Assessment Performance: | |
| Performer's Name: | Performer's Signature: |
| Performance Coach's Name: | Performance Coach's Signature: |

**Include this page in the evidence you enter into your portfolio.

Performance Objective(s)

| Given This... | Do This... | To Meet These Criteria... |
|---|--|--|
| <ul style="list-style-type: none"> • A Balanced Scorecard for the organization • A location for conducting a meeting with stakeholders • Representatives from key stakeholder groups • Balanced Scorecard Performance Measure Dictionary (Appendix A) • Balanced Scorecard Template (Appendix B) • Resources for facilitating groups discussion and brainstorming, including markers, sticky notes, and/or supporting computer software and equipment | <p>Collaboratively develop Balanced Scorecard performance objectives that promote meaningful parent involvement in the school.</p> | <ul style="list-style-type: none"> • The detailed task performance criteria listed in the Performance Checklists in the Topic Practice(s), Final Practice, and Final Assessment • GLISI's criteria for how to work effectively as a team leader/facilitator, listed in the Performance Feedback Form(s) located in the Final Practice and Final Assessment |

Module Introduction

Developing Increased Parent Engagement Using the Balanced Scorecard

It is not uncommon for schools to seek more meaningful parent engagement in the organization. Effectively involving parents in the support of children and their education produces significant and lasting results.

As part of this module series on Balanced Performance Leadership, this module seeks to leverage your organization's Balanced Scorecard in an effort to generate more effective parent involvement and strengthen your Balanced Scorecard.

In this module, you will take a concentrated look at your performance objectives under the goal area (perspective) known as Student and Stakeholder Engagement, examine current practices, refine or reformulate the performance objectives, and incorporate them into your Balanced Scorecard.

Reviewing Your Balanced Scorecard

The Balanced Scorecard is a key element in any organization's performance management strategy. It describes the strategy of the organization through goal areas and provides related strategic objectives, performance measures, performance improvement targets, and required initiatives.

Review your organization's Balanced Scorecard. If your organization does not have a Scorecard, refer to these modules for the creation process:

- *Leading a Team to Develop Performance Foundations*
- *Leading a Team to Develop Strategy Maps*
- *Leading a Team to Select Performance Measures*
- *Leading a Team to Develop a Balanced Scorecard*

For further assistance contact GLISI.

Balanced Performance Leadership



National Standards This module references the National Standards for Parent/Family Involvement Programs, published by the National PTA (revised 2004).

- What Is the Leader's Role?**
- Be prepared with the necessary materials and supplies
 - Schedule and communicate meeting times and locations to participants
 - Thank the participants, acknowledging everyone's worthwhile contribution to the group and commitment to future actions
-

**Begin With The
End in Mind**

Research about effective assessment of performance tells us that the learner always performs better when they understand what they should know and be able to do. For this reason, you are encouraged to **review the Final Assessment in its entirety** in order to:

- Understand the knowledge, skills, and behaviors that are being taught and tested in this module
 - Understand the standards (performance criteria) by which your performance will be assessed
 - Gauge your current level of performance against what will be expected of you by the end of the module
 - Prioritize which areas to concentrate on as you work through the module
-

Topic 1: Refining Objectives

Examining Student and Stakeholder Engagement

A recommended set of balanced performance measures for schools generally include measures in four goal areas (perspectives): Student Achievement, Student and Stakeholder Engagement, Internal Processes, and Learning and Growth.

In this topic you will examine and refine your current Balanced Scorecard's performance objectives under Student and Stakeholder Engagement so that they measure increased parent engagement.

When Do I Begin This Task? (Cues)

This process can be incorporated into your regularly scheduled review and update of your Balanced Scorecard, or completed separately at any time.

What Resources are Required?

A location for conducting a meeting with stakeholders

Volunteers representing the following:

- Administrator
 - School board member
 - Business or community leader
 - Parent
 - Student
 - Teacher
-

How Do I Do It?

- Read through the steps in the step-action table (see next page)
 - Study any accompanying examples
 - Complete the practice exercise
 - Share the results with your Performance Coach
-

Step-Action Table

| Step | Action |
|-------------------------------------|---|
| 1. Create a school team | <p>Establish a Parent Involvement Team, made up of key stakeholders, to review and refine parent and family involvement policy and practices. The team should include at least one person from each of the following key stakeholder groups:</p> <ul style="list-style-type: none"> • Administrators • School board members • Business or community leaders • Parents • Students • Teachers |
| 2. Examine current practices | <p>Lead the Parent Involvement Team to examine current strategies or initiatives designed to support parent involvement in the organization:</p> <ul style="list-style-type: none"> • List the strategies/initiatives • Discuss the strengths and weaknesses of each strategy/initiative • Rate the effectiveness of each strategy/initiative, such as 1-5, with 5 being the most effective |

| Step | Action |
|--|--|
| 3. Brainstorm new ideas | <p>Lead a brainstorming session in which the team identifies at least three potential strategies or initiatives:</p> <ul style="list-style-type: none"> • Begin with a review of the school's mission, vision, and values. Emphasize that potential strategies or initiatives should, in some form, align with the school's foundational statements. • Using sticky notes, have team members identify potential strategies or initiatives that could possibly support increased parent involvement. As a way to stimulate thought processes, remind team members that Student and Stakeholder Engagement includes measures that indicate: <ul style="list-style-type: none"> ○ Attendance ○ How engaged students, parents and the community are ○ How positive their perceptions are ○ The extent to which they would continue to choose the school to provide education and services in the presence of other options ○ Funding support such as votes for Special Local Option Sales Tax to support education ○ Student participation in extracurricular activities ○ Community investment and support ○ Volunteer support ○ Climate study feedback ratings ○ Student feedback regarding the degree to which teaching and support improves and accelerates their learning ○ Loyalty and engagement • Collaboratively organize the ideas into logical areas, or categories. Document the results. |
| 4. Draft performance objectives | <p>For each category established in Step 3, examine the collection of ideas and draft a performance objective that promotes parent involvement.</p> <p>NOTE: Performance objectives do not necessarily have to be new. Your team may find that current Balanced Scorecard performance objectives under Student and Stakeholder Engagement are entirely relevant and effective. However, it is more likely that existing objectives hold opportunities for improvement, or that completely new objectives are needed.</p> |

Practice Exercise

Instructions

- Follow the steps in the Step-Action Table for this topic
 - Complete the Practice Worksheet, listing results that are realistic based on the information in the practice scenario below
 - Check your work
 - Meet with your Performance Coach to review the results and decide what to do next
-

Practice Scenario

Work with at least one other key stakeholder (an adult who is a potential member of the Parent Involvement Team) to develop at least one new or refined performance objective.

Practice Worksheet

List individuals who you have invited to participate in the Parent Involvement Team.

- Administrator -
- School board member -
- Business or community leader -
- Parent -
- Student -
- Teacher -
- Other -

Examine current practices that promote parent involvement.

| Strategy/Initiative | Strengths | Weaknesses | Rating |
|---------------------|-----------|------------|--------|
| | | | |
| | | | |
| | | | |
| | | | |

Practice Worksheet

Document the brainstormed categories and ideas for potential strategies and initiatives either in the space below or in another suitable format.

| Category | Potential Strategies and Initiatives | Draft Performance Objective |
|-----------------|---|------------------------------------|
| | | |
| | | |
| | | |
| | | |
| | | |

Topic Practice Performance Checklist

Select one: Performer's self-assessment Performance Coach's observations

Performer's Name: _____

Performance Coach's Name: _____

Date of Performance: _____

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes.*

| Evidence | Criteria | Proficient? Give Feedback. |
|---|--|---|
| 1. Parent Involvement Team is formed | The team includes at least one from each key stakeholder group: <ul style="list-style-type: none"> <input type="checkbox"/> Administrators <input type="checkbox"/> School board members <input type="checkbox"/> Business or community leaders <input type="checkbox"/> Parents <input type="checkbox"/> Students <input type="checkbox"/> Teachers <p><i>(For the purposes of this practice, only one key stakeholder is required)</i></p> | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 2. Current practices have been examined | <input type="checkbox"/> Strategies and initiatives are current <p>The following is present for each strategy or initiative listed:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Strengths <input type="checkbox"/> Weaknesses <input type="checkbox"/> Effectiveness rating | <input type="checkbox"/> Yes <input type="checkbox"/> No |

Topic 1: Refining Objectives

Developing Increased Parent Engagement in Schools Using the Balanced Scorecard

| Evidence | Criteria | Proficient? Give Feedback. |
|---|---|---|
| 3. Brainstormed categories and ideas are documented | <input type="checkbox"/> Brainstormed categories and ideas for potential strategies are present <input type="checkbox"/> At least 3 categories (logical areas) are present <i>(For the purposes of this practice, only one category is required)</i> | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 4. Performance objectives are drafted | <input type="checkbox"/> At least 3 draft performance objectives are present. Each draft performance objective: <input type="checkbox"/> Is based on one or more of the brainstormed categories <input type="checkbox"/> Promotes parent involvement <i>(For the purposes of this practice, only one draft performance objective is required)</i> | <input type="checkbox"/> Yes <input type="checkbox"/> No |

Topic 2: Updating the Balanced Scorecard

Updating the Balanced Scorecard

The Balanced Scorecard Performance Measure Dictionary provides users with a detailed description of the performance objective (performance measure), including leading and lagging indicators, initiatives, and cost to implement.

In this topic you will:

- Document the new or refined performance objectives that promote parent involvement
 - Update your Balanced Scorecard with the new objectives
-

When Do I Begin This Task? (Cues)

After new or refined performance objectives have been drafted by the Parent Involvement Team

What Resources are Required?

- Draft performance objectives from Topic 1
 - Balanced Scorecard Performance Measure Dictionary (Appendix A)
 - Balanced Scorecard Template (Appendix B)
-

How Do I Do It?

- Read through the steps in the step-action table (see next page)
 - Study any accompanying examples
 - Complete the practice exercise
 - Share the results with your Performance Coach
-

Step-Action Table

| Step | Action |
|--|---|
| <p>1. Complete the Performance Measure Dictionary</p> | <p>Use the Performance Measure Dictionary (Appendix A), or another acceptable format, to finalize and document the draft performance objectives from Topic 1. Complete one entry (template page) for each performance objective, filling in the following information:</p> <ul style="list-style-type: none"> • Goal Area: Identify the goal area under which the measure is categorized. • Performance Measure number and name: Provide each Measure with a number and brief name to simplify tracking of measures in the future. • Owner: Identify the person or group responsible for results. • Description: Briefly describe the Performance Measure and why it is critical to the organization. • Data Source/Collector: Identify the data source (be specific, i.e. document title, page number, etc.) and the person responsible for providing the performance data. • Strategic Objective: Identify which Strategic Objective the measure is supporting (refer to Strategy Map if necessary). • Leading/Lagging: Determine whether the Performance Measure is a leading (performance driver) or lagging (outcome measure) measure (refer to Performance Measure’s list if necessary). • Frequency of recording: Determine how often you plan to report performance on this measure. • Metric: Identify the unit in which the measure is expressed (e.g. points, percentages, dollars, etc.). • Baseline: This is where you will record the measure of performance as it was at your “starting point.” • Periods 1,2,3: You will update these fields over time to insert “actuals” of performance during the next three time periods being observed. • Target: This is where you will record the performance level that is desired in the future (as stated in your SMART Goals) • Initiatives: This is where you will identify the initiatives (programs, activities, and projects) being implemented in order to meet or exceed the organization’s performance targets. • Cost to implement: This is where you will list the anticipated cost for implementing the initiatives. Estimate, if necessary. |
| <p>2. Update the Balanced Scorecard</p> | <p>Use the template in Appendix B, or another acceptable format, to update your Balanced Scorecard Student and Stakeholder Engagement goal area with your new or refined performance objectives.</p> |

Topic 2: Updating the Balanced Scorecard
 Developing Increased Parent Engagement in Schools Using the Balanced Scorecard

| Step | Action | |
|------------------------------------|--|---|
| 3. Elicit Feedback | Distribute the updated Balanced Scorecard among a larger pool of key stakeholders (at least 20), highlighting the new performance objectives and related initiatives. Request feedback, and allow sufficient time for response and reaction. | |
| | IF... | ...Then |
| | Feedback warrants significant review and possible revision of the revised Balanced Scorecard contents | Reconvene the Parent Involvement Team to consider the potential changes and revise the Balanced Scorecard as needed |
| | Feedback is nominal | Make the needed revisions and ask at least one key stakeholder to review the changes |
| 4. Secure community support | Publish the new Balanced Scorecard and make it readily available to the community. | |

Practice Exercise

Instructions

- Follow the steps in the Step-Action Table for this topic
 - Complete the Practice Worksheet, listing results that are realistic based on the information in the practice scenario below
 - Check your work
 - Meet with your Performance Coach to review the results and decide what to do next
-

Practice Scenario

Work with at least one other key stakeholder (an adult who is a potential member of the Parent Involvement Team) to complete a Performance Measure Dictionary entry for at least one draft performance objective.

Update the Student and Stakeholder Engagement goal area with the new information.

Distribute the revisions to at least 3 other key stakeholders. Document and incorporate their feedback as appropriate.

Practice Worksheet

Document feedback from key stakeholders on the revised Balanced Scorecard. Summarize the main points in the space below or another appropriate format.

Topic Practice Performance Checklist

Select one: Performer's self-assessment Performance Coach's observations

Performer's Name: _____

Performance Coach's Name: _____

Date of Performance: _____

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes.*

| Evidence | Criteria | Proficient? Give Feedback. |
|---|--|---|
| 1. The Performance Measure Dictionary is complete | <input type="checkbox"/> An entry is present for each draft performance objective identified in Topic 1 (<i>Only 1 entry is required for this practice</i>) The following information is present for each entry: <input type="checkbox"/> Goal Area <input type="checkbox"/> Performance Measure number and name <input type="checkbox"/> Owner <input type="checkbox"/> Description <input type="checkbox"/> Data Source/Collector <input type="checkbox"/> Strategic Objective <input type="checkbox"/> Leading/Lagging indicators <input type="checkbox"/> Frequency of recording <input type="checkbox"/> Metric <input type="checkbox"/> Baseline <input type="checkbox"/> Periods <input type="checkbox"/> Target <input type="checkbox"/> Initiatives <input type="checkbox"/> Cost to Implement | <input type="checkbox"/> Yes <input type="checkbox"/> No |

Topic 2: Updating the Balanced Scorecard
 Developing Increased Parent Engagement in Schools Using the Balanced Scorecard

| Evidence | Criteria | Proficient? Give Feedback. |
|--|--|---|
| 2. The Balanced Scorecard has been updated | <input type="checkbox"/> Student and Stakeholder Engagement goal area includes new or refined performance objectives <input type="checkbox"/> Each performance objective documented in the Performance Measure Dictionary is present <i>(Only 1 is required for this practice)</i> | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 3. Feedback has been collected | <input type="checkbox"/> The updated Balanced Scorecard was distributed to at least 20 key stakeholders <i>((Only 3 are required for this practice)</i> <input type="checkbox"/> Summarized feedback is present <input type="checkbox"/> Feedback has been incorporated into the Balanced Scorecard as appropriate | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 4. The new Balanced Scorecard has been published | <input type="checkbox"/> The new Balanced Scorecard has been distributed to the school and school community <i>(Not required for this practice)</i> | <input type="checkbox"/> Yes <input type="checkbox"/> No |

Final Practice

Instructions

- Perform this practice, referring to the topic step-action tables as needed.
 - Complete the Final Practice Worksheet, listing results that are realistic based on the information in the practice scenario.
 - Check your work.
 - Meet with your Performance Coach to review the results and decide what to do next.
 - Completing this Final Practice requires meetings with a team of 2 - 4 peers. Prepare for these meetings by:
 - Communicating the time and location of the meeting to the participants in advance
 - Preparing and providing copies of a meeting agenda
 - Being prepared with all the necessary materials and resources
-

Practice Scenario

As in Topics 1 and 2, work with a small group of key stakeholders in order to practice the process of collaboratively developing Balanced Scorecard performance objectives that promote meaningful parent involvement:

Establish a team of at least three other key stakeholders to serve as your practice Parent Involvement Team.

With your team:

- Develop at least one new or refined performance objective
 - Complete a Performance Measure Dictionary entry for at least one draft performance objective
 - Update the Student and Stakeholder Engagement goal area with the new information
 - Distribute the revisions to at least 5 other key stakeholders
 - Document and incorporate stakeholder feedback as appropriate
-

Final Practice Worksheet

List individuals who you have invited to participate in the Parent Involvement Team.

- Administrator -
- School board member -
- Business or community leader -
- Parent -
- Student -
- Teacher -
- Other -

Examine current practices that promote parent involvement.

| Strategy/Initiative | Strengths | Weaknesses | Rating |
|---------------------|-----------|------------|--------|
| | | | |
| | | | |
| | | | |
| | | | |

Final Practice Worksheet

Document the brainstormed categories and ideas for potential strategies and initiatives either in the space below or in another suitable format.

| Category | Potential Strategies and Initiatives | Draft Performance Objective |
|-----------------|---|------------------------------------|
| | | |
| | | |
| | | |
| | | |
| | | |

Final Practice Worksheet

Document feedback from key stakeholders on the revised Balanced Scorecard. Summarize the main points in the space below or another appropriate format.

Final Practice Performance Checklist

Select one: Performer's self-assessment Performance Coach's observations

Performer's Name: _____

Performance Coach's Name: _____

Date of Performance: _____

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes and **all** Feedback Form (next form) items are marked 3 or 4 (or Not Applicable).*

| Evidence | Criteria | Proficient? Give Feedback. |
|---|--|---|
| 1. Parent Involvement Team is formed | The team includes at least one from each key stakeholder group: <ul style="list-style-type: none"> <input type="checkbox"/> Administrators <input type="checkbox"/> School board members <input type="checkbox"/> Business or community leaders <input type="checkbox"/> Parents <input type="checkbox"/> Students <input type="checkbox"/> Teachers <p><i>(For the purposes of this practice, only 3 key stakeholders are required)</i></p> | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 2. Current practices have been examined | <input type="checkbox"/> Strategies and initiatives are current | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| | The following is present for each strategy or initiative listed: <ul style="list-style-type: none"> <input type="checkbox"/> Strengths <input type="checkbox"/> Weaknesses <input type="checkbox"/> Effectiveness rating | |

Final Practice

Developing Increased Parent Engagement in Schools Using the Balanced Scorecard

| Evidence | Criteria | Proficient? Give Feedback. |
|---|---|---|
| 3. Brainstormed categories and ideas are documented | <input type="checkbox"/> Brainstormed categories and ideas for potential strategies are present <input type="checkbox"/> At least 3 categories (logical areas) are present <i>(For the purposes of this practice, only one category is required)</i> | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 4. Performance objectives are drafted | <input type="checkbox"/> At least 3 draft performance objectives are present. Each draft performance objective: <input type="checkbox"/> Is based on one or more of the brainstormed categories <input type="checkbox"/> Promotes parent involvement <i>(For the purposes of this practice, only one draft performance objective is required)</i> | <input type="checkbox"/> Yes <input type="checkbox"/> No |

| Evidence | Criteria | Proficient? Give Feedback. |
|---|---|---|
| 5. The Performance Measure Dictionary is complete | <input type="checkbox"/> An entry is present for each draft performance objective identified in Topic 1 (<i>Only 1 entry is required for this practice</i>) The following information is present for each entry: <ul style="list-style-type: none"> <input type="checkbox"/> Goal Area <input type="checkbox"/> Performance Measure number and name <input type="checkbox"/> Owner <input type="checkbox"/> Description <input type="checkbox"/> Data Source/Collector <input type="checkbox"/> Strategic Objective <input type="checkbox"/> Leading/Lagging indicators <input type="checkbox"/> Frequency of recording <input type="checkbox"/> Metric <input type="checkbox"/> Baseline <input type="checkbox"/> Periods <input type="checkbox"/> Target <input type="checkbox"/> Initiatives <input type="checkbox"/> Cost to Implement | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 6. The Balanced Scorecard has been updated | <input type="checkbox"/> Student and Stakeholder Engagement goal area includes new or refined performance objectives <input type="checkbox"/> Each performance objective documented in the Performance Measure Dictionary is present (<i>Only 1 is required for this practice</i>) | <input type="checkbox"/> Yes <input type="checkbox"/> No |

Final Practice

Developing Increased Parent Engagement in Schools Using the Balanced Scorecard

| Evidence | Criteria | Proficient? Give Feedback. |
|--|---|---|
| 7. Feedback has been collected | <input type="checkbox"/> The updated Balanced Scorecard was distributed to at least 20 key stakeholders (<i>Only 5 are required for this practice</i>) <input type="checkbox"/> Summarized feedback is present <input type="checkbox"/> Feedback has been incorporated into the Balanced Scorecard as appropriate | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 8. The new Balanced Scorecard has been published | <input type="checkbox"/> The new Balanced Scorecard has been distributed to the school and school community (<i>Not required for this practice</i>) | <input type="checkbox"/> Yes <input type="checkbox"/> No |

Final Practice Feedback Form (page 1 of 2)

Performer's Name: _____

Performance Coach's Name: _____

Date of Performance: _____

*Use the rubric below to rate **only** the cross-cutting leadership skills on this page (including write-ins). Enter this performance into your portfolio when **all** Performance Checklist (previous form) items are marked Yes and **all** Feedback Form (this form) items are marked 3 or 4 (or Not Applicable).*

| Performance Levels | | | |
|--|--|--|--|
| 1 | 2 | 3 | 4 |
| Emerging Needs Study and Practice <i>Few/none of desired behaviors were adequately displayed.</i> | Developing Needs Practice <i>Some but not all of the desired behaviors were adequately displayed.</i> | Proficient Meets Criteria and Expectations <i>All desired behaviors were displayed and performed correctly.</i> | Distinguished Could be Used as a Model to Teach Others |

Eligible for Portfolio

| How effective was the performer in these Cross-Cutting Skills? | | Rating | | | | |
|--|---|--------|---|---|---|-----|
| 1. | Facilitating group interaction and managing participation | 1 | 2 | 3 | 4 | n/a |
| 2. | Assisting the group to meet task criteria | 1 | 2 | 3 | 4 | n/a |
| 3. | Modeling appropriate leadership behaviors | 1 | 2 | 3 | 4 | n/a |
| 4. | Teaching others how to perform the tasks | 1 | 2 | 3 | 4 | n/a |
| 5. | Presenting information clearly and concisely | 1 | 2 | 3 | 4 | n/a |
| 6. | Leveraging technology to increase effectiveness | 1 | 2 | 3 | 4 | n/a |
| 7. | Motivating others to achieve success | 1 | 2 | 3 | 4 | n/a |
| 8. | Using group processes to achieve desired results | 1 | 2 | 3 | 4 | n/a |
| 10. | Other: | 1 | 2 | 3 | 4 | n/a |

Turn the page to provide additional written feedback (required).

Final Practice Feedback Form (page 1 of 2)

Performer's Name: _____

Performance Coach's Name: _____

Date of Performance: _____

If any element was rated less than 3, what needs to be done to score a 3? To score a 4?

What greatest strengths did the leader exhibit through this performance?

What could be done to improve this leader's performance? Include any criteria on the Performance Checklist that were missed. Be specific.

Were there any significant issues that must be rectified (by additional practice and assessment) before entering this evidence into the Portfolio?

Final Assessment

When Can I Take the Final Assessment?

Complete the Final Assessment when you are able to sufficiently execute the module’s performance objective(s) according to the:

- Task-related criteria on the Final Assessment Performance Checklist
- Cross-cutting leadership skills on the Performance Feedback Form

When you take the Final Assessment — either as someone who takes it to “test out” of the module or as someone who has worked through the topics and Final Practice — the underlying assumption is that you are a competent, experienced, performer. This means that the Final Assessment does not include any “helps,” such as step-action tables or worksheets.

When Can I Add the Final Assessment to My Portfolio?

Has your Final Assessment performance met all the criteria on the Final Assessment Performance Checklist and earned at least a 3 on all of the cross-cutting skills on the Final Assessment Feedback Form?

| Yes | No |
|---|---|
| <p>Add these items to your Portfolio and talk to your Performance Coach about next steps:</p> <ul style="list-style-type: none"> • Final Assessment Performance Checklist • Final Assessment Feedback Form • Module Progress Tracker page • Additional artifacts such as documents, slides, video tapes, participant feedback forms, etc. | <p>Do the following as needed before attempting the Final Assessment again when you are ready:</p> <ul style="list-style-type: none"> • Obtain performance feedback from your Performance Coach • Review relevant topics in the module • Repeat Topic Practices and/or the Final Practice • Pursue additional learning, training and experience |

**Final Assessment
Instructions**

1. Gain permission from your supervisor, sponsor, or Performance Coach to complete the Final Assessment in a school setting.
 2. Schedule the date, time and location of your session — one that works for you, your Performance Coach, and other participants.
 3. Invite a group of 2 - 4 volunteers to assist you. Ideally, you should invite your real work team. (If you are an aspiring leader, this may be a team that you would lead once you enter the leadership role. For an incumbent leader, it should reflect the team or type of team that you are currently leading.)
 4. Review the following with your Performance Coach:
 - Task-related criteria on the Final Assessment Performance Checklist
 - Cross-cutting leadership skills on the Performance Feedback Form
 - Final Assessment Scenario (on the next page)
 5. Prepare any other materials or information that you and your participants need to have with you on the day of the activity.
 6. Perform the Final Assessment as follows:
 - In a real school or district setting
 - With a team of teachers, staff, or other leaders as appropriate
 - Observed by your Performance Coach
 7. Retain artifacts from your performance (documents, slides, etc.)
 8. Obtain feedback from your Performance Coach about your performance, and discuss next steps.
-

Final Assessment Scenario

Work with your school and community to collaboratively develop Balanced Scorecard performance objectives that promote meaningful parent involvement:

Establish a full team of key stakeholders to serve as the Parent Involvement Team.

With your team:

- Develop new or refined performance objectives
 - Complete a Performance Measure Dictionary entry for each draft performance objective
 - Update the Student and Stakeholder Engagement goal area with the new information
 - Distribute the revisions to at least 20 other key stakeholders
 - Document and incorporate stakeholder feedback as appropriate
 - Distribute the new Balanced Scorecard to secure community support
-

Final Assessment Performance Checklist

Select one: Performer's self-assessment Performance Coach's observations

Performer's Name: _____

Performance Coach's Name: _____

Date of Performance: _____

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes and **all** Feedback Form (next form) items are marked 3 or 4 (or Not Applicable).*

| Evidence | Criteria | Proficient? Give Feedback. |
|---|---|---|
| 1. Parent Involvement Team is formed | The team includes at least one from each key stakeholder group: <input type="checkbox"/> Administrators <input type="checkbox"/> School board members <input type="checkbox"/> Business or community leaders <input type="checkbox"/> Parents <input type="checkbox"/> Students <input type="checkbox"/> Teachers | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 2. Current practices have been examined | <input type="checkbox"/> Strategies and initiatives are current The following is present for each strategy or initiative listed: <input type="checkbox"/> Strengths <input type="checkbox"/> Weaknesses <input type="checkbox"/> Effectiveness rating | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 3. Brainstormed categories and ideas are documented | <input type="checkbox"/> Brainstormed categories and ideas for potential strategies are present <input type="checkbox"/> At least 3 categories (logical areas) are present | <input type="checkbox"/> Yes <input type="checkbox"/> No |

| Evidence | Criteria | Proficient? Give Feedback. |
|---|---|---|
| 4. Performance objectives are drafted | <input type="checkbox"/> At least 3 draft performance objectives are present. Each draft performance objective: <ul style="list-style-type: none"> <input type="checkbox"/> Is based on one or more of the brainstormed categories <input type="checkbox"/> Promotes parent involvement | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 5. The Performance Measure Dictionary is complete | <input type="checkbox"/> An entry is present for each draft performance objective identified in Topic 1 (<i>Only 1 entry is required for this practice</i>) The following information is present for each entry: <ul style="list-style-type: none"> <input type="checkbox"/> Goal Area <input type="checkbox"/> Performance Measure number and name <input type="checkbox"/> Owner <input type="checkbox"/> Description <input type="checkbox"/> Data Source/Collector <input type="checkbox"/> Strategic Objective <input type="checkbox"/> Leading/Lagging indicators <input type="checkbox"/> Frequency of recording <input type="checkbox"/> Metric <input type="checkbox"/> Baseline <input type="checkbox"/> Periods <input type="checkbox"/> Target <input type="checkbox"/> Initiatives <input type="checkbox"/> Cost to Implement | <input type="checkbox"/> Yes <input type="checkbox"/> No |

Final Assessment

Developing Increased Parent Engagement in Schools Using the Balanced Scorecard

| Evidence | Criteria | Proficient? Give Feedback. |
|--|--|---|
| 6. The Balanced Scorecard has been updated | <input type="checkbox"/> Student and Stakeholder Engagement goal area includes new or refined performance objectives <input type="checkbox"/> Each performance objective documented in the Performance Measure Dictionary is present | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 7. Feedback has been collected | <input type="checkbox"/> The updated Balanced Scorecard was distributed to at least 20 key stakeholders <input type="checkbox"/> Summarized feedback is present <input type="checkbox"/> Feedback has been incorporated into the Balanced Scorecard as appropriate | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 8. The new Balanced Scorecard has been published | <input type="checkbox"/> The new Balanced Scorecard has been distributed to the school and school community | <input type="checkbox"/> Yes <input type="checkbox"/> No |

Final Assessment Feedback Form (page 1 of 2)

Performer's Name: _____

Performance Coach's Name: _____

Date of Performance: _____

*Use the rubric below to rate **only** the cross-cutting leadership skills on this page (including write-ins). Enter this performance into your portfolio when **all** Performance Checklist (previous form) items are marked Yes and **all** Feedback Form (this form) items are marked 3 or 4 (or Not Applicable).*

| Performance Levels | | | |
|--|--|--|--|
| 1 | 2 | 3 | 4 |
| Emerging Needs Study and Practice <i>Few/none of desired behaviors were adequately displayed.</i> | Developing Needs Practice <i>Some but not all of the desired behaviors were adequately displayed.</i> | Proficient Meets Criteria and Expectations <i>All desired behaviors were displayed and performed correctly.</i> | Distinguished Could be Used as a Model to Teach Others |
| Eligible for Portfolio | | | |

| How effective was the performer in these Cross-Cutting Skills? | | Rating | | | | |
|--|---|--------|---|---|---|-----|
| 1. | Facilitating group interaction and managing participation | 1 | 2 | 3 | 4 | n/a |
| 2. | Assisting the group to meet task criteria | 1 | 2 | 3 | 4 | n/a |
| 3. | Modeling appropriate leadership behaviors | 1 | 2 | 3 | 4 | n/a |
| 4. | Teaching others how to perform the tasks | 1 | 2 | 3 | 4 | n/a |
| 5. | Presenting information clearly and concisely | 1 | 2 | 3 | 4 | n/a |
| 6. | Leveraging technology to increase effectiveness | 1 | 2 | 3 | 4 | n/a |
| 7. | Motivating others to achieve success | 1 | 2 | 3 | 4 | n/a |
| 8. | Using group processes to achieve desired results | 1 | 2 | 3 | 4 | n/a |
| 10. | Other: | 1 | 2 | 3 | 4 | n/a |

Turn the page to provide additional written feedback (required).

Final Assessment Feedback Form (page 1 of 2)

Performer's Name: _____

Performance Coach's Name: _____

Date of Performance: _____

If any element was rated less than 3, what needs to be done to score a 3? To score a 4?

What greatest strengths did the leader exhibit through this performance?

What could be done to improve this leader's performance? Include any criteria on the Performance Checklist that were missed. Be specific.

Were there any significant issues that must be rectified (by additional practice and assessment) before entering this evidence into the Portfolio?

Appendix A: Balanced Scorecard Performance Measure Dictionary

(See next page)

Appendix A: Balanced Scorecard Performance Measure Dictionary
 Developing Increased Parent Engagement in Schools Using the Balanced Scorecard

**Balanced Scorecard
 Performance Measure Dictionary Template**

| | | | | | | | | |
|------------------------------------|------------------|--|--------------------------------------|--|------------------|------------------------|-------------------------------|------------------|
| Goal Area: | | | Performance Objective/Number: | | | Owner: | | |
| Performance Measure/Number: | | | | | | | | |
| Description: | | | | | | | | |
| LeadLag: | Metric: | | Data Source: | | | Data Collector: | | |
| Baseline: (Yr/Otr) | Period 1: | | Period 2: | | Period 3: | | Target: | |
| Description: | | | | | | Rank: | Resource Requirements: | |
| | | | | | | | \$ | Man years |
| Initiatives: | | | | | | | | |
| 1. | | | | | | | | |
| 2. | | | | | | | | |
| 3. | | | | | | | | |
| 4. | | | | | | | | |

Appendix B: Balanced Scorecard Template

(See next two pages)

Recommended Reading and Resources

National Standards for Parent/Family Involvement Programs: An Implementation Guide for School Communities. National PTA. (Revised 2004)

Kaplan, R. & Norton, D. *The Balanced Scorecard: Translating Strategy into Action*. Boston, MA: Harvard Business School Press, 1996.

Kaplan, R. & Norton, D. *Strategy Maps: Converting Intangible Assets into Tangible Outcomes*. Boston, MA: Harvard Business School Press, 2004.

Niven, P. *Balanced Scorecard Step By Step: For Government and Nonprofit Agencies*. New York, NY: John Wiley & Sons, 2003.

Niven, P. *Balanced Scorecard Step By Step: Maximizing Performance and Maintaining Results*. New York, NY: John Wiley & Sons, 2002.

Poister, T. *Measuring Performance in Public and Nonprofit Organizations*. San Francisco, CA: Jossey-Bass, 2003.

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