

Balanced Performance Improvement Series:

**Leading a School through SACS
Accreditation 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.

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Progress Tracker

		Completed	Date
Preparing	Review Performance Objective	<input type="checkbox"/>	_____
	↓		
	Review Final Assessment*	<input type="checkbox"/>	_____
	↓		
Learning	Topic 1: Reviewing SACS Standards	<input type="checkbox"/>	_____
	↓		
	Topic 2: Linking SACS Standards to 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 that has been cascaded throughout the school • A computer, word processing software, email, and printer/copier • Balanced Scorecard template (Appendix A) 	<p>Lead a school through SACS Accreditation preparation using the Balanced Scorecard</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

Leading a School through SACS Accreditation Using the BSC

The SACS review process helps schools earn and maintain accreditation by providing external checks, support, and feedback (AdvancED 2007).

When preparing for SACS review, you can save a great deal of time and effort by leveraging your school's current Balanced Scorecard. With a few modifications, your Scorecard can serve as evidence for meeting the SACS standards.

In this module you will link your school's strategic objectives, as documented in your Balanced Scorecard, to the seven SACS standards.

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.

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: Reviewing SACS Standards

Reviewing SACS Standards

Before comparing the SACS standards to your Balanced Scorecard, it will help to familiarize yourself with the standards and how they apply to your school's current state. In this topic, you will identify ways in which each of the seven SACS standards is evident in your school.

What Resources are Required?

Refer to Appendix A for a list of the SACS standards and indicators for schools.

Tip(s)

You may wish to refer to the following AdvancED web site to review the process for school accreditation:

- www.advanc-ed.org/accreditation/standards
-

How Do I Do It?

Use the Step-Action Table (starting on the next page) to work through the process.

Step-Action Table

Step	Action
1. List the standards	<p>List the seven standard areas:</p> <ol style="list-style-type: none"> 1. Vision and Purpose 2. Governance and Leadership 3. Teaching and Learning 4. Documenting and Using Results 5. Resources and Support Systems 6. Stakeholder Communications and Relationships 7. Commitment to Continuous Improvement
2. Review Standard 1	<ul style="list-style-type: none"> • Read and discuss the indicators for standard 1, Vision and Purpose (see Appendix A). • Give brief examples of how your school is currently meeting the standard. List at least one example per indicator. If no example is available, write “Not available.” See figure 1.1 for an example of how this information can be documented.
3. Review Standard 2	<ul style="list-style-type: none"> • Read and discuss the indicators for standard 2, Governance and Leadership. • Give examples of how your school is currently meeting the standard. List at least one example per indicator. If no example is available, write “Not available.”
4. Review Standard 3	<ul style="list-style-type: none"> • Read and discuss the indicators for standard 3, Teaching and Learning. • Give examples of how your school is currently meeting the standard. List at least one example per indicator. If no example is available, write “Not available.”
5. Review Standard 4	<ul style="list-style-type: none"> • Read and discuss the indicators for standard 4, Documenting and Using Results. • Give examples of how your school is currently meeting the standard. List at least one example per indicator. If no example is available, write “Not available.”
6. Review Standard 5	<ul style="list-style-type: none"> • Read and discuss the indicators for standard 5, Resources and Support Systems. • Give examples of how your school is currently meeting the standard. List at least one example per indicator. If no example is available, write “Not available.”

Topic 1: Reviewing SACS Standards
Leading a School through SACS Accreditation Using the Balanced Scorecard

Step	Action
7. Review Standard 6	<ul style="list-style-type: none">• Read and discuss the indicators for standard 6, Stakeholder Communications and Relationships.• Give examples of how your school is currently meeting the standard. List at least one example per indicator. If no example is available, write “Not available.”
8. Review Standard 7	<ul style="list-style-type: none">• Read and discuss the indicators for standard 7, Commitment to Continuous Improvement.• Give examples of how your school is currently meeting the standard. List at least one example per indicator. If no example is available, write “Not available.”

Topic 1: Reviewing SACS Standards
Leading a School through SACS Accreditation Using the Balanced Scorecard

Standard	Indicator	Evidence
1. Vision and Purpose	1.1 Establishes a vision for the school in collaboration with its stakeholders	<i>Foundational statements developed, including vision statement, with input from key stakeholders</i>
	1.2 Communicates the vision and purpose to build stakeholder understanding and support	<i>Vision communicated via live presentations, web site, and monthly newsletter</i>
	1.3 Identifies goals to advance the vision	<i>Strategic goals and performance measures developed in support of vision</i>
	1.4 Develops and continuously maintains a profile of the school, its students, and the community	<i>School and student profile updated annually; community profile updated every three years by consulting firm</i>
	1.5 Ensures that the school's vision and purpose guide the teaching and learning process	<i>Cascaded school-level Balanced Scorecard and Scorecards for all departments</i>
	1.6 Reviews its vision and purpose systematically and revises them when appropriate	<i>Foundational statements reviewed annually</i>

Figure 1.1 Examples of current evidence for meeting standards

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 1-2 volunteers to review the SACS standards.

For the purpose of this practice, identify examples of current evidence for at least three of the standards.

Topic Practice Worksheet

Standard	Indicator	Evidence
1. Vision and Purpose	1.1 Establishes a vision for the school in collaboration with its stakeholders	
	1.2 Communicates the vision and purpose to build stakeholder understanding and support	
	1.3 Identifies goals to advance the vision	
	1.4 Develops and continuously maintains a profile of the school, its students, and the community	
	1.5 Ensures that the school's vision and purpose guide the teaching and learning process	
	1.6 Reviews its vision and purpose systematically and revises them when appropriate	
2. Governance and Leadership	2.1 Establishes and communicates policies and procedures that provide for the effective operation of the school	
	2.2 Recognizes and preserves the executive, administrative, and leadership prerogatives of the administrative head of the school	
	2.3 Ensures compliance with applicable local, state, and federal laws, standards, and regulations	
	2.4 Employs a system that provides for analysis and review of student performance and school and effectiveness	
	2.5 Fosters a learning community	
	2.6 Provides teachers and students opportunities to learn	

Topic Practice Worksheet

Standard	Indicator	Evidence
	2.7 Provides stakeholders meaningful roles in the decision-making process that promote a culture of participation, responsibility, and ownership	
	2.8 Controls curricular and extracurricular activities that are sponsored by the school	
	2.9 Responds to community expectations and stakeholder satisfaction	
	2.10 Implements an evaluation system that provides for the professional growth of all personnel	
3. Teaching and Learning	3.1 Develops and implements curriculum based on clearly-defined expectations for student learning	
	3.2 Promotes active involvement of students in the learning process, including opportunities for them to explore application of higher order thinking skills and investigate new approaches to applying their learning	
	3.3 Gathers, analyzes, and uses data and research in making curricular and instructional choices	
	3.4 Designs and uses instructional strategies, innovations, and activities that are research-based and reflective of best practice	
	3.5 Offers a curriculum that challenges each student to excel, reflects a commitment to equity, and demonstrates an appreciation of diversity	
	3.6 Allocates and protects instructional time to support student learning	

Topic Practice Worksheet

Standard	Indicator	Evidence
	3.7 Provides for articulation and alignment between and among all levels of schools	
	3.8 Implements interventions to help students meet expectations for student learning	
	3.9 Monitors school climate and takes appropriate steps to ensure that it is conducive to student learning	
	3.10 Provides comprehensive information and media services that support the curricular and instructional programs	
4. Documenting and Using Results	4.1 Establishes performance measures for student learning that yield information that is reliable, valid, and free of bias	
	4.2 Develops and implements a comprehensive assessment system for assessing progress toward meeting the expectations for student learning	
	4.3 Uses student assessment data for making decisions for continuous improvement of teaching and learning processes	
	4.4 Conducts a systematic analysis of instructional and organizational effectiveness and uses the results to improve student performance	
	4.5 Communicates the results of student performance and school effectiveness to all stakeholders	
	4.6 Uses comparison and trend data of student performance from comparable schools in evaluating its effectiveness	
	4.7 Demonstrates verifiable growth in student performance	

Topic Practice Worksheet

Standard	Indicator	Evidence
	4.8 Maintains a secure, accurate, and complete student record system in accordance with state and federal regulations	
5. Resources and Support Systems	5.1 Recruits, employs, and mentors qualified professional staff that are capable of fulfilling assigned roles and responsibilities	
	5.2 Assigns professional staff responsibilities based on their qualifications (i.e., professional preparation, ability, knowledge, and experience)	
	5.3 Ensures that all staff participate in a continuous program of professional development	
	5.4 Provides and assigns staff that are sufficient in number to meet the vision and purpose of the school	
	5.5 Budgets sufficient resources to support its educational programs and to implement its plans for improvement	
	5.6 Monitors all financial transactions through a recognized, regularly audited accounting system	
	5.7 Maintains the site, facilities, services, and equipment to provide an environment that is safe and orderly for all occupants	
	5.8 Possess a written security and crisis management plan with appropriate training for stakeholders	

Topic Practice Worksheet

Standard	Indicator	Evidence
	5.9 Ensures that each student has access to guidance services that include, but are not limited to, counseling, appraisal, mentoring, staff consulting, referral, and educational and career planning	
	5.10 Provides appropriate support for students with special needs	
6. Stakeholder Communications and Relationships	6.1 Fosters collaboration with community stakeholders to support student learning	
	6.2 Has formal channels to listen to and communicate with stakeholders	
	6.3 Solicits the knowledge and skills of stakeholders to enhance the work of the school	
	6.4 Communicates the expectations for student learning and goals for improvement to all stakeholders	
	6.5 Provides information about students, their performance, and school effectiveness that is meaningful and useful to stakeholders	
7. Commitment to Continuous Improvement	7.1 Engages in a continuous process of improvement that articulates the vision and purpose the school is pursuing (Vision); maintains a rich and current description of students, their performance, school effectiveness, and the school community (Profile); employs goals and interventions to improve student performance (Plan); and documents and uses the results to inform what happens next (Results)	
	7.2 Engages stakeholders in the processes of continuous improvement	

Topic Practice Worksheet

Standard	Indicator	Evidence
	7.3 Ensures that plans for continuous improvement are aligned with the vision and purpose of the school and expectations for student learning	
	7.4 Provides professional development for school personnel to help them implement improvement interventions to achieve improvement goals	
	7.5 Monitors and communicates the results of improvement efforts to stakeholders	
	7.6 Evaluates and documents the effectiveness and impact of its continuous process of improvement	

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. SACS Standards have been reviewed (at least three for the practice exercise)	<input type="checkbox"/> Each standard was read and discussed <input type="checkbox"/> Examples of how the school is currently meeting the standard are present, one per indicator or “Not available” <input type="checkbox"/> “Best met” standard selected	<input type="checkbox"/> Yes <input type="checkbox"/> No

Topic 2: Linking SACS Standards to the Balanced Scorecard

Linking SACS Standards to the BSC

The ultimate goal is to have a Balanced Scorecard that provides satisfactory evidence of meeting all seven SACS standards for school accreditation.

In this topic, you will:

- Identify links and gaps between the standards and your school's strategic objectives and performance measures
 - Make enhancements to the Scorecard in order to fill in the gaps
-

What Resources are Required?

Modified version of the Balanced Scorecard template, with an additional column for SACS standard identification (see Appendix B)

How Do I Do It?

Use the Step-Action Table (starting on the next page) to work through the process.

Step-Action Table

Step	Action
1. Check foundational statements	Review your school’s foundational statements for reflection of SACS standards: <ul style="list-style-type: none"> • Create a concept map with the mission, vision, and values statements in the center. Then add standards as appropriate, discussing how they are reflected in the statements. (See figure 2.1) • This activity will give you an idea of what to look for when you start linking standards and indicators to strategic objectives.
2. Update the BSC	Transfer you school’s existing Balanced Scorecard to the revised template that includes an additional column for SACS standard identification (see Appendix B).
3. Identify links and gaps between BSC and SACS Standards	Check the updated Balanced Scorecard’s strategic objectives for the presence of SACS standards 1-7: <ul style="list-style-type: none"> • Look for strategic objectives and related performance measures that can serve as evidence for SACS standard indicators. • Write the indicator number in the column marked SACS standard. • Repeat this process for each of the seven SACS Standards. • Keep track of any indicators that are not supported with evidence in the Balanced Scorecard.
4. Revise the BSC as needed	Review the list of SACS indicators that are not supported with evidence in the Balanced Scorecard. Develop additional strategic objectives and performance measures that will provide the necessary evidence, and/or modify existing objectives and measures to achieve the desired result. Refer to the GLISI module, <i>Leading a Team to Develop a Balanced Scorecard</i> , for the process for creating strategic objectives and performance measures.
5. Check for complete coverage	Double check that all SACS standards are covered with evidence in the Balanced Scorecard.

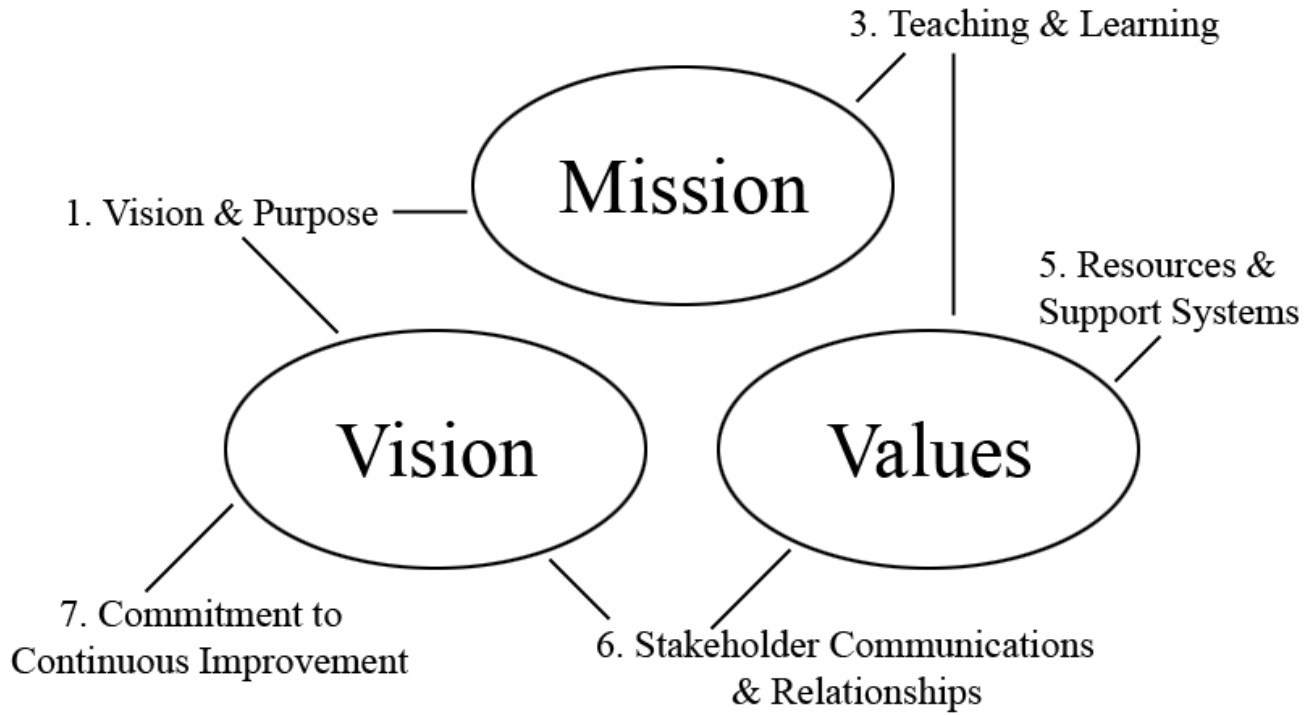


Figure 2.1 Mapping foundational statements and SACS standards

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 1-2 volunteers to:

- Link the SACS Standards to your Balanced Scorecard's strategic objectives
- Document gaps where the Scorecard does not provide adequate evidence
- Modify existing, or create new, strategic objectives and performance measures as needed to provide sufficient evidence

For the purpose of this practice, select and compare at least three of the seven standards to your Scorecard.

Topic Practice Worksheet

List the numbers of standard indicators that are represented with adequate evidence in the current Balanced Scorecard.

1. Vision and Purpose:
2. Governance and Leadership:
3. Teaching and Learning:
4. Documenting and Using Results:
5. Resources and Support Systems:
6. Stakeholder Communications and Relationships:
7. Commitment to Continuous Improvement:

List standard indicators that are not supported with evidence in the Balanced Scorecard.

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. Foundational statements reviewed for reflection of SACS standards	<input type="checkbox"/> Concept map shows connections between mission, vision, values statements and as many as seven SACS standards	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Balanced Scorecard has been updated	<input type="checkbox"/> Balanced Scorecard is in the template that includes a column for SACS Standards	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Links and gaps between the Scorecard and SACS Standards are identified <i>(at least three for the practice exercise)</i>	<input type="checkbox"/> SACS standard indicator numbers are present for strategic objectives and related performance measures that serve as evidence <input type="checkbox"/> Indicators that are not supported with evidence in the Balanced Scorecard are listed by number	<input type="checkbox"/> Yes <input type="checkbox"/> No

Topic 2: Linking SACS Standards to the Balanced Scorecard
 Leading a School through SACS Accreditation Using the Balanced Scorecard

Evidence	Criteria	Proficient? Give Feedback.
4. Balanced Scorecard is revised as needed to reflect SACS standards	<input type="checkbox"/> Strategic objectives and performance measures are created, or existing items modified, to provide sufficient evidence of all SACS standards <i>(if applicable)</i> <input type="checkbox"/> The Scorecard provides satisfactory evidence of meeting all seven SACS standards for school accreditation	<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

Working with a team of 2-4 peers:

- Review the SACS standards by identifying examples of current evidence for your school
- Link the SACS Standards to your Balanced Scorecard's strategic objectives
- Document gaps where the Scorecard does not provide adequate evidence
- Modify existing, or create new, strategic objectives and performance measures as needed to provide sufficient evidence

For the purpose of this practice, work with at least three of the SACS Standards.

Final Practice Worksheet

Standard	Indicator	Evidence
1. Vision and Purpose	1.1 Establishes a vision for the school in collaboration with its stakeholders	
	1.2 Communicates the vision and purpose to build stakeholder understanding and support	
	1.3 Identifies goals to advance the vision	
	1.4 Develops and continuously maintains a profile of the school, its students, and the community	
	1.5 Ensures that the school's vision and purpose guide the teaching and learning process	
	1.6 Reviews its vision and purpose systematically and revises them when appropriate	
2. Governance and Leadership	2.1 Establishes and communicates policies and procedures that provide for the effective operation of the school	
	2.2 Recognizes and preserves the executive, administrative, and leadership prerogatives of the administrative head of the school	
	2.3 Ensures compliance with applicable local, state, and federal laws, standards, and regulations	
	2.4 Employs a system that provides for analysis and review of student performance and school and effectiveness	
	2.5 Fosters a learning community	
	2.6 Provides teachers and students opportunities to learn	

Final Practice Worksheet

Standard	Indicator	Evidence
	2.7 Provides stakeholders meaningful roles in the decision-making process that promote a culture of participation, responsibility, and ownership	
	2.8 Controls curricular and extracurricular activities that are sponsored by the school	
	2.9 Responds to community expectations and stakeholder satisfaction	
	2.10 Implements an evaluation system that provides for the professional growth of all personnel	
3. Teaching and Learning	3.1 Develops and implements curriculum based on clearly-defined expectations for student learning	
	3.2 Promotes active involvement of students in the learning process, including opportunities for them to explore application of higher order thinking skills and investigate new approaches to applying their learning	
	3.3 Gathers, analyzes, and uses data and research in making curricular and instructional choices	
	3.4 Designs and uses instructional strategies, innovations, and activities that are research-based and reflective of best practice	
	3.5 Offers a curriculum that challenges each student to excel, reflects a commitment to equity, and demonstrates an appreciation of diversity	
	3.6 Allocates and protects instructional time to support student learning	

Final Practice Worksheet

Standard	Indicator	Evidence
	3.7 Provides for articulation and alignment between and among all levels of schools	
	3.8 Implements interventions to help students meet expectations for student learning	
	3.9 Monitors school climate and takes appropriate steps to ensure that it is conducive to student learning	
	3.10 Provides comprehensive information and media services that support the curricular and instructional programs	
4. Documenting and Using Results	4.1 Establishes performance measures for student learning that yield information that is reliable, valid, and free of bias	
	4.2 Develops and implements a comprehensive assessment system for assessing progress toward meeting the expectations for student learning	
	4.3 Uses student assessment data for making decisions for continuous improvement of teaching and learning processes	
	4.4 Conducts a systematic analysis of instructional and organizational effectiveness and uses the results to improve student performance	
	4.5 Communicates the results of student performance and school effectiveness to all stakeholders	
	4.6 Uses comparison and trend data of student performance from comparable schools in evaluating its effectiveness	
	4.7 Demonstrates verifiable growth in student performance	

Final Practice Worksheet

Standard	Indicator	Evidence
	4.8 Maintains a secure, accurate, and complete student record system in accordance with state and federal regulations	
5. Resources and Support Systems	5.1 Recruits, employs, and mentors qualified professional staff that are capable of fulfilling assigned roles and responsibilities	
	5.2 Assigns professional staff responsibilities based on their qualifications (i.e., professional preparation, ability, knowledge, and experience)	
	5.3 Ensures that all staff participate in a continuous program of professional development	
	5.4 Provides and assigns staff that are sufficient in number to meet the vision and purpose of the school	
	5.5 Budgets sufficient resources to support its educational programs and to implement its plans for improvement	
	5.6 Monitors all financial transactions through a recognized, regularly audited accounting system	
	5.7 Maintains the site, facilities, services, and equipment to provide an environment that is safe and orderly for all occupants	
	5.8 Possess a written security and crisis management plan with appropriate training for stakeholders	

Final Practice Worksheet

Standard	Indicator	Evidence
	5.9 Ensures that each student has access to guidance services that include, but are not limited to, counseling, appraisal, mentoring, staff consulting, referral, and educational and career planning	
	5.10 Provides appropriate support for students with special needs	
6. Stakeholder Communications and Relationships	6.1 Fosters collaboration with community stakeholders to support student learning	
	6.2 Has formal channels to listen to and communicate with stakeholders	
	6.3 Solicits the knowledge and skills of stakeholders to enhance the work of the school	
	6.4 Communicates the expectations for student learning and goals for improvement to all stakeholders	
	6.5 Provides information about students, their performance, and school effectiveness that is meaningful and useful to stakeholders	
7. Commitment to Continuous Improvement	7.1 Engages in a continuous process of improvement that articulates the vision and purpose the school is pursuing (Vision); maintains a rich and current description of students, their performance, school effectiveness, and the school community (Profile); employs goals and interventions to improve student performance (Plan); and documents and uses the results to inform what happens next (Results)	
	7.2 Engages stakeholders in the processes of continuous improvement	

Final Practice Worksheet

Standard	Indicator	Evidence
	7.3 Ensures that plans for continuous improvement are aligned with the vision and purpose of the school and expectations for student learning	
	7.4 Provides professional development for school personnel to help them implement improvement interventions to achieve improvement goals	
	7.5 Monitors and communicates the results of improvement efforts to stakeholders	
	7.6 Evaluates and documents the effectiveness and impact of its continuous process of improvement	

Final Practice Worksheet

List the numbers of standard indicators that are represented with adequate evidence in the current Balanced Scorecard.

1. Vision and Purpose:
2. Governance and Leadership:
3. Teaching and Learning:
4. Documenting and Using Results:
5. Resources and Support Systems:
6. Stakeholder Communications and Relationships:
7. Commitment to Continuous Improvement:

List standard indicators that are not supported with evidence in the Balanced Scorecard.

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. SACS Standards have been reviewed (<i>at least three for the practice exercise</i>)	<input type="checkbox"/> Each standard was read and discussed <input type="checkbox"/> Examples of how the school is currently meeting the standard are present, one per indicator or "Not available" <input type="checkbox"/> "Best met" standard selected	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Foundational statements reviewed for reflection of SACS standards	<input type="checkbox"/> Concept map shows connections between mission, vision, values statements and as many as seven SACS standards	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Balanced Scorecard has been updated	<input type="checkbox"/> Balanced Scorecard is in the template that includes a column for SACS Standards	<input type="checkbox"/> Yes <input type="checkbox"/> No

Evidence	Criteria	Proficient? Give Feedback.
<p>4. Links and gaps between the Scorecard and SACS Standards are identified (<i>at least three for the practice exercise</i>)</p>	<p><input type="checkbox"/> SACS standard indicator numbers are present for strategic objectives and related performance measures that serve as evidence</p> <p><input type="checkbox"/> Indicators that are not supported with evidence in the Balanced Scorecard are listed by number</p>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>
<p>5. Balanced Scorecard is revised as needed to reflect SACS standards</p>	<p><input type="checkbox"/> Strategic objectives and performance measures are created, or existing items modified, to provide sufficient evidence of all SACS standards (<i>if applicable</i>)</p> <p><input type="checkbox"/> The Scorecard provides satisfactory evidence of meeting all seven SACS standards for school accreditation</p>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>

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**

Working with a team that includes at least 2 school leaders:

- Review the SACS standards by identifying examples of current evidence for your school
 - Link the seven SACS Standards to your Balanced Scorecard's strategic objectives.
 - Document gaps where the Scorecard does not provide adequate evidence.
 - Modify existing, or create new, strategic objectives and performance measures as needed to provide sufficient evidence.
-

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. SACS Standards have been reviewed	<input type="checkbox"/> Each standard was read and discussed <input type="checkbox"/> Examples of how the school is currently meeting the standard are present, one per indicator or “Not available” <input type="checkbox"/> “Best met” standard selected	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Foundational statements reviewed for reflection of SACS standards	<input type="checkbox"/> Concept map shows connections between mission, vision, values statements and as many as seven SACS standards	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Balanced Scorecard has been updated	<input type="checkbox"/> Balanced Scorecard is in the template that includes a column for SACS Standards	<input type="checkbox"/> Yes <input type="checkbox"/> No

Evidence	Criteria	Proficient? Give Feedback.
4. Links and gaps between the Scorecard and SACS Standards are identified	<input type="checkbox"/> SACS standard indicator numbers are present for strategic objectives and related performance measures that serve as evidence <input type="checkbox"/> Indicators that are not supported with evidence in the Balanced Scorecard are listed by number	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. Balanced Scorecard is revised as needed to reflect SACS standards	<input type="checkbox"/> Strategic objectives and performance measures are created, or existing items modified, to provide sufficient evidence of all SACS standards (<i>if applicable</i>) <input type="checkbox"/> The Scorecard provides satisfactory evidence of meeting all seven SACS standards for school accreditation	<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
<p>Emerging Needs Study and Practice <i>Few/none of desired behaviors were adequately displayed.</i></p>	<p>Developing Needs Practice <i>Some but not all of the desired behaviors were adequately displayed.</i></p>	<p>Proficient Meets Criteria and Expectations <i>All desired behaviors were displayed and performed correctly.</i></p>	<p>Distinguished Could be Used as a Model to Teach Others</p>

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: SACS Standards & Indicators

STANDARD 1: VISION AND PURPOSE

The school establishes and communicates a shared purpose and direction for improving the performance of students and the effectiveness of the school.

Quality School Indicators:

In fulfillment of this standard, the school:

- 1.1 Establishes a vision for the school in collaboration with its stakeholders
- 1.2 Communicates the vision and purpose to build stakeholder understanding and support
- 1.3 Identifies goals to advance the vision
- 1.4 Develops and continuously maintains a profile of the school, its students, and the community
- 1.5 Ensures that the school's vision and purpose guide the teaching and learning process
- 1.6 Reviews its vision and purpose systematically and revises them when appropriate

Impact Statement:

A school is successful in meeting this standard when it commits to a purpose and direction. The school establishes expectations for student learning aligned with the school's vision that is supported by school personnel and external stakeholders. These expectations serve as the focus for assessing student performance and school effectiveness. The school's vision guides allocations of time and human, material, and fiscal resources.

STANDARD 2: GOVERNANCE AND LEADERSHIP

The school provides governance and leadership that promote student performance and school effectiveness.

Quality School Indicators:

GOVERNANCE

In fulfillment of this standard, the school operates under the jurisdiction of a governing board that:

- 2.1 Establishes and communicates policies and procedures that provide for the effective operation of the school
- 2.2 Recognizes and preserves the executive, administrative, and leadership prerogatives of the administrative head of the school
- 2.3 Ensures compliance with applicable local, state, and federal laws, standards, and regulations

LEADERSHIP

In fulfillment of this standard, the school has leadership that:

- 2.4 Employs a system that provides for analysis and review of student performance and school and effectiveness
- 2.5 Fosters a learning community
- 2.6 Provides teachers and students opportunities to learn
- 2.7 Provides stakeholders meaningful roles in the decision-making process that promote a culture of participation, responsibility, and ownership
- 2.8 Controls curricular and extracurricular activities that are sponsored by the school
- 2.9 Responds to community expectations and stakeholder satisfaction
- 2.10 Implements an evaluation system that provides for the professional growth of all personnel

Impact Statement:

A school is successful in meeting this standard when it has leaders who are advocates for the school's vision and improvement efforts. The leaders provide direction and allocate resources to implement curricular and co-curricular programs that enable students to achieve expectations for their learning. Leaders encourage collaboration and shared responsibility for school improvement among stakeholders. The school's policies, procedures, and organizational conditions ensure equity of learning opportunities and support for innovation.

STANDARD 3: TEACHING AND LEARNING

The school provides research-based curriculum and instructional methods that facilitate achievement for all students.

Quality School Indicators:

In fulfillment of this standard, the school:

- 3.1 Develops and implements curriculum based on clearly-defined expectations for student learning
- 3.2 Promotes active involvement of students in the learning process, including opportunities for them to explore application of higher order thinking skills and investigate new approaches to applying their learning
- 3.3 Gathers, analyzes, and uses data and research in making curricular and instructional choices
- 3.4 Designs and uses instructional strategies, innovations, and activities that are research-based and reflective of best practice
- 3.5 Offers a curriculum that challenges each student to excel, reflects a commitment to equity, and demonstrates an appreciation of diversity

- 3.6 Allocates and protects instructional time to support student learning
- 3.7 Provides for articulation and alignment between and among all levels of schools
- 3.8 Implements interventions to help students meet expectations for student learning
- 3.9 Monitors school climate and takes appropriate steps to ensure that it is conducive to student learning
- 3.10 Provides comprehensive information and media services that support the curricular and instructional programs

Impact Statement:

A school is successful in meeting this standard when it implements a curriculum based on clear and measurable expectations for student learning that provides opportunities for all students to acquire requisite knowledge, skills, and attitudes. Teachers use proven instructional practices that actively engage students in the learning process. Teachers provide opportunities for students to apply their knowledge and skills to real world situations. Teachers give students feedback to improve their performance.

STANDARD 4: DOCUMENTING AND USING RESULTS

The school enacts a comprehensive assessment system that monitors and documents performance and uses these results to improve student performance and school effectiveness.

Quality School Indicators:

In fulfillment of this standard, the school:

- 4.1 Establishes performance measures for student learning that yield information that is reliable, valid, and free of bias
- 4.2 Develops and implements a comprehensive assessment system for assessing progress toward meeting the expectations for student learning
- 4.3 Uses student assessment data for making decisions for continuous improvement of teaching and learning processes
- 4.4 Conducts a systematic analysis of instructional and organizational effectiveness and uses the results to improve student performance
- 4.5 Communicates the results of student performance and school effectiveness to all stakeholders
- 4.6 Uses comparison and trend data of student performance from comparable schools in evaluating its effectiveness
- 4.7 Demonstrates verifiable growth in student performance
- 4.8 Maintains a secure, accurate, and complete student record system in accordance with state and federal regulations

Impact Statement:

A school is successful in meeting this standard when it uses a comprehensive assessment system based on clearly-defined performance measures. The system is used to assess student performance on expectations for student learning, evaluate the effectiveness of curriculum and instruction, and determine interventions to improve student performance. The assessment system yields timely and accurate information that is meaningful and useful to school leaders, teachers, and other stakeholders in understanding student performance, school effectiveness, and the results of improvement efforts.

STANDARD 5: RESOURCES AND SUPPORT SYSTEMS

The school has the resources and services necessary to support its vision and purpose and to ensure achievement for all students.

Quality School Indicators:

HUMAN RESOURCES

In fulfillment of this standard, the school:

- 5.1 Recruits, employs, and mentors qualified professional staff that are capable of fulfilling assigned roles and responsibilities
- 5.2 Assigns professional staff responsibilities based on their qualifications (i.e., professional preparation, ability, knowledge, and experience)
- 5.3 Ensures that all staff participate in a continuous program of professional development
- 5.4 Provides and assigns staff that are sufficient in number to meet the vision and purpose of the school
- 5.5 Budgets sufficient resources to support its educational programs and to implement its plans for improvement
- 5.6 Monitors all financial transactions through a recognized, regularly audited accounting system
- 5.7 Maintains the site, facilities, services, and equipment to provide an environment that is safe and orderly for all occupants
- 5.8 Possess a written security and crisis management plan with appropriate training for stakeholders
- 5.9 Ensures that each student has access to guidance services that include, but are not limited to, counseling, appraisal, mentoring, staff consulting, referral, and educational and career planning
- 5.10 Provides appropriate support for students with special needs

Impact Statement:

A school is successful in meeting this standard when it has sufficient human, material, and fiscal resources to implement a curriculum that enables students to achieve expectations for

student learning, to meet special needs, and to comply with applicable regulations. The school employs and allocates staff that are well-qualified for their assignments. The school provides ongoing learning opportunities for all staff to improve their effectiveness. The school ensures compliance with applicable local, state, and federal regulations.

STANDARD 6: STAKEHOLDER COMMUNICATIONS AND RELATIONSHIPS

The school fosters effective communications and relationships with and among its stakeholders.

Quality School Indicators:

In fulfillment of this standard, the school:

- 6.1 Fosters collaboration with community stakeholders to support student learning
- 6.2 Has formal channels to listen to and communicate with stakeholders
- 6.3 Solicits the knowledge and skills of stakeholders to enhance the work of the school
- 6.4 Communicates the expectations for student learning and goals for improvement to all stakeholders
- 6.5 Provides information about students, their performance, and school effectiveness that is meaningful and useful to stakeholders

Impact Statement:

A school is successful in meeting this standard when it has the understanding, commitment, and support of stakeholders. School personnel seek opportunities for collaboration and shared leadership among stakeholders to help students learn and advance improvement efforts.

STANDARD 7: COMMITMENT TO CONTINUOUS IMPROVEMENT

The school establishes, implements, and monitors a continuous process of improvement that focuses on student performance.

Quality School Indicators:

In fulfillment of this standard, the school:

- 7.1 Engages in a continuous process of improvement that articulates the vision and purpose the school is pursuing (Vision); maintains a rich and current description of students, their performance, school effectiveness, and the school community (Profile); employs goals and interventions to improve student performance (Plan); and documents and uses the results to inform what happens next (Results)
- 7.2 Engages stakeholders in the processes of continuous improvement
- 7.3 Ensures that plans for continuous improvement are aligned with the vision and purpose of the school and expectations for student learning

7.4 Provides professional development for school personnel to help them implement improvement interventions to achieve improvement goals

7.5 Monitors and communicates the results of improvement efforts to stakeholders

7.6 Evaluates and documents the effectiveness and impact of its continuous process of improvement

Impact Statement:

A school is successful in meeting this standard when it implements a collaborative and ongoing process for improvement that aligns the functions of the school with the expectations for student learning. Improvement efforts are sustained and the school demonstrates progress in improving student performance and school effectiveness. New improvement efforts are informed by the results of earlier efforts through reflection and assessment of the improvement process.

Appendix B: Balanced Scorecard Template

(See next two pages)

Recommended Reading and Resources

Advanced Education for Quality School Systems: A Practitioner's Guide. AdvancEd, 2007.

The Advanced Education Process for Quality Schools: A Practitioner's Guide. AdvancEd, 2007.

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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