

Balanced Performance Improvement Series:

Leading a Team to Select Performance Measures



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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Performance Objective(s)

Given This...	Do This...	To Meet These Criteria...
<ul style="list-style-type: none"> • A minimum of eight hours (in one session, or divided into several sessions) • A minimum of four participants • Performance data on the organization (school or district) • Strategic organizational goal areas and performance objectives • Strategic plan, improvement plan, and other plans that contain the key strategies of the organization • Organizational mission, vision, values statements • Organizational Balanced Scorecard (if available) 	<ul style="list-style-type: none"> • Lead a team to generate an “initial list” of potential performance measures for the organization • Lead a team to select a “final list” of balanced performance measures that reflect the results of the organization 	<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 Team to Select Performance Measures

Your organization recently underwent the development of foundational statements—mission, vision, and values—and is in the process of developing a performance management process for the organization. The next step is to develop performance measures that reflect the effectiveness of the organization in accomplishing the mission and vision. In the future, you may develop a strategy map, and ultimately a Balanced Scorecard, on your performance management journey.

In order to get the results expected, your organization must identify:

- The performance results critical to success
- How success is measured
- The expectations that must be communicated to those who influence the results

By selecting a list of performance measures, you will generate an important message to share with the organization and its stakeholders—that is, which performance results are important to driving the mission of the organization—and create an environment wherein you can begin tracking results in those areas to ensure that the organization is on track to meeting its goals.

This module is designed to help you select performance measures that reflect the effectiveness of the processes and the stewardship of resources under your leadership.

A Note About Terminology

In the area of performance management, the terms *indicator* and *measure* (i.e. performance indicator and performance measure) are often used interchangeably. This series of modules will use the term *performance measure*.

When Should Our Team Select Performance Measures?

There are several cues that suggest the time is right to identify and select performance measures:

- A strategic plan, annual plan, or improvement plan is needed or is being revised
 - The Balanced Scorecard (or another performance management tool) is being introduced to the organization
 - The leader wishes for the organization—and for those who can influence its results—to focus on the performance measures that reflect the effectiveness of the organization
 - A desire exists to improve student achievement and organizational effectiveness
 - The leader needs to provide status reports, “state of the school” or “state of the district” reports/speeches, and other performance communications to governance, stakeholders, faculty, staff and students
-

Including Leading and Lagging Measures

Typically, organizations tend to focus on “lagging measures” of performance—those which are reported “after the fact,” at which point they cannot be changed or improved, such as standardized test scores. This practice can inadvertently encourage people in the organization to spend time and energy accounting for why things turned out the way they did.

To break out of this reactive position, challenge your team to face the current results as indicated by the key, or most critical, performance measures and ask, “What can I do now to get better results?”

This strategy shifts the focus to include “leading measures” of performance—those that can be addressed to influence performance and outcomes before they happen. This approach broadens the field of measures to include both leading and lagging performance measures.

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: Generating Potential Performance Measures

Generating Potential Performance Measures

In order to effectively measure, monitor, manage and communicate about the performance of the school, district, or function of the school system, you must first determine the most critical performance measures that reflect the results of the organization. These measures provide data that answer such questions as:

- “How effective and efficient are the processes of the organization?”
- “How well does the organization manage the resources under its stewardship?”
- “Is this organization successful in achieving its mission and vision?”
- “How well does this organization serve its customers (students) and its stakeholders (parents, community, taxpayers)?”
- “Does this organization’s faculty and staff have the right mix of skills and tools?”
- “Does this organization operate in a climate that sustains improvement?”

Performance measures should also align with the major improvement strategies of the organization.

In this topic you will:

- Identify leading and lagging measures
 - Illustrate linkages between performance drivers and outcomes
-

Why Determine Performance Measures?

Leading an organization without using measures to set goals, gauge progress, and communicate regarding performance is like playing football without being able to see the lines on the field, the end zones, or the scoreboard. Everyone involved may have a different sense of whether they are succeeding or falling short of the goal, but they don't know for sure until some outside entity tells them they're winning or losing.

The performance measures chosen by the leader should create focus and balance, and give the organization enough information to make changes while it still can.

Using Balanced Performance Measures

In the early 1980s, organizations began to see the importance of measuring and monitoring a range of performance measures. For example, businesses began to realize that to grow and sustain their positions in the marketplace they needed to monitor a broader range of results rather than just comparing current financial performance to some previous period of financial performance.

Businesses began to realize that financial comparison measures do not provide indications of customer, quality, or employee problems or opportunities early enough to take action that will ultimately improve financial performance. Businesses began to set and monitor performance measures that addressed all of these areas of performance. Gradually, non-profits, government and schools also began to see the need to monitor a wider range of drivers of performance.

A good set of performance measures should contain a mix of **outcome measures (lagging measures)** and measures for **performance drivers (leading measures)** that lead to improved performance on lagging measures. The leader should ensure that enough leading measures are identified to provide information to inform decisions and actions that impact critical lagging measures.

Lagging Measures and Leading Measures

Lagging measures are typically the measures of performance for which the school or school system is publicly accountable. They are normally those measures that are easiest to identify and capture.

The most widely used lagging educational measures are state and national test scores. Test scores in education are the equivalent to financial measures in business. As measures, both profit and test scores reflect the overall success of their respective organizations. However, these measures alone do not tell those inside the organizations enough about how all performance drivers are impacting results. In order to make informed decisions, key decision makers need to use leading measures in addition to lagging measures.

Because most public measures, such as state test scores, are reported only once per year, leaders can use **leading measures** to monitor the results of processes and systems that impact those lagging measures.

For example, comparing student performance on classroom assessments against specific standards can give students, teachers, and other school leaders an indication of students' achievement progress before state tests are administered. This gives staff and administration time to provide additional support to students before state testing occurs.

The Four Balanced Goal Areas (or Perspectives) for Schools and Districts

Different organizations look at different areas of their organization's performance in order to develop a balanced set of performance measures. These areas are called *goal areas* or *perspectives*.

The following is a list of four recommended goal areas for schools and districts, which have proven to provide a balanced view of performance of educational organizations. Selecting performance measures that fall into these four categories will help you monitor, measure, and communicate the performance of your organization:

1. Student Achievement
2. Student and Stakeholder Engagement
3. Internal Processes
4. Learning and Growth

More detail about each of the goal areas can be found on the following pages.

**Goal Area #1:
Student
Achievement**

The Student Achievement goal area includes test scores for disaggregated groups of students, as well as other performance measures, such as:

- Completion rates
 - Post graduation placement rates
 - AP exam scores
 - National Merit Scholars
 - Results on classroom assessments
 - Student discipline
 - Other measures of student learning and success
-

**Goal Area #2:
Student and
Stakeholder
Engagement**

The Student and Stakeholder Engagement goal area includes measures that indicate:

- Attendance
 - How engaged students, parents, and the community are
 - How positive student, parent, and community 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
-

**Goal Area #3:
Internal Processes**

The Internal Processes goal area includes the measurable results of:

- Operations
 - Food services
 - Transportation
 - Facilities management
 - Student support services
 - Budgets and finance
 - Legal and regulatory compliance
 - Audit exceptions
 - Construction schedules
 - Other measures of operational and administrative support
 - Other processes through which the organization is managed, its work is done, and resources are stewarded
-

**Goal Area #4:
Learning and
Growth**

The goal area of Learning and Growth reflects:

- The quality and value of professional learning, communication, and teamwork among faculty and staff
 - Staff/teacher attendance
 - Teacher retention data, which includes the percentage of highly qualified teachers, the percentage of new teachers in mentoring programs, and similar measures
-

**Sources of
Performance
Measure Data**

Publicly reported results data includes some of the major performance measures for your school or district. The following sources provide data to the public via the web:

- The Georgia Department of Education
- The Office of Student Achievement
- The Georgia School Council Institute's Similar Schools Comparison

While some data is publicly accessible, other data must be collected inside the school or district.

**Types of
Performance
Measure Data**

Refer to the Appendix for examples of types of data sources that can be used to establish measures in the four goal areas for schools and districts.

**Generating Ideas
for Additional
performance
measures**

In addition to the leadership team, faculty and staff can suggest performance measures. Other sources for ideas for performance measures are:

- Information from school or district studies and assessments, such as the Baldrige measures for education, SACS reviews, etc.
 - Educational research reports of schools and/or districts
 - Benchmark data from best of class schools, districts or other organizations with similar processes
 - Parent and student survey feedback
-

Cause and Effect Relationships of Performance Measures

An important step in selecting a balanced set of performance measures is to examine the linkages:

- (1) Between lagging measures and leading measures
- (2) Between outcomes of the four major Goal Areas.

The leader should engage the team in this comparison exercise. Begin the process by looking at how the major outcomes in the other three categories impact Student Achievement. Then, examine the relationships between the other Goal Areas.

For example, the leader engages the members of the team in brainstorming the performance drivers in the other goal areas that impact student achievement, as well as the performance measures for processes in the teaching and learning process that impact student achievement.

Creating a map or visual that represents the connections and cause and effect relationships can help the team explore the linkages.

Changes in Performance Measures

Performance measures change over time. However, the major categories of performance (Student Achievement, Student and Stakeholder Engagement, Internal Processes, and Learning and Growth) tend to remain constant.

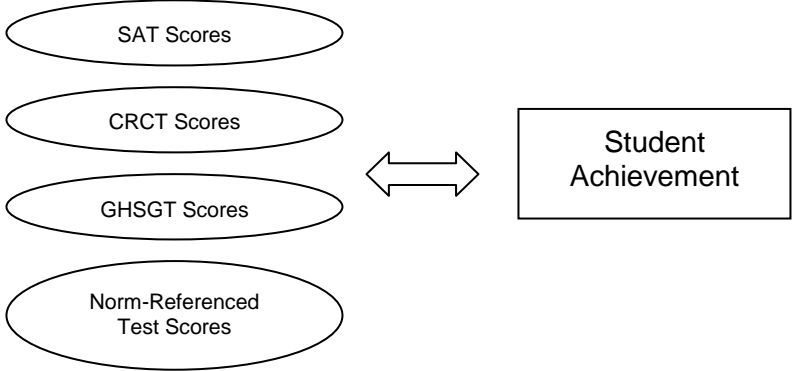
As strategies change and evolve, the performance measures for those strategies will also change. Measures, the frequency of measurement, and ways of calculating the measures will also change.

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. Open the meeting</p>	<p>Welcome and thank participants. Explain the purpose of the meeting. Review the agenda and answer questions. Provide enough background information about performance measures that the group understands the concepts being discussed and the desired results of the process. (A group that has never worked with performance measures will need more information/training than one who is familiar with the concept.)</p>
<p>2. Review the purpose</p>	<p>Explain the purpose of this task:</p> <p>Before you can select a final list of performance measures that reflect the results of your organization, you must brainstorm a set of balanced performance measures that could be measured and monitored.</p>
<p>3. Identify publicly reported lagging measures</p>	<ul style="list-style-type: none"> • Brainstorm a list of the major lagging performance measures, which are monitored by the state or federal government, especially those reported to the public by federal agencies, the state, the school board and other outside entities. • Check the list by identifying how often one can measure performance for each of the measures. If the measurement can only be reported once per year or less, you have confirmed that it is most likely a lagging measure. <p>Example: CRCT and SAT scores are good examples of lagging measures. They are reported and become public record with no opportunity to change the results on record until the next reporting period.</p> <p>NOTE: There may not be publicly-reported lagging measures in all goal areas.</p>

Step	Action
<p>4. Match publicly reported measures to goal areas</p>	<p>Organize the publicly reported measures into these categories:</p> <ul style="list-style-type: none"> • Student Achievement • Student and Stakeholder Engagement • Internal Processes • Learning and Growth <p>Example: The following are examples of publicly reported measures for student achievement:</p> <div style="text-align: center;">  <p>The diagram illustrates the relationship between specific measures and a goal area. On the left, four ovals are stacked vertically, containing the text: 'SAT Scores', 'CRCT Scores', 'GHSQT Scores', and 'Norm-Referenced Test Scores'. A horizontal double-headed arrow points from the middle of these ovals to a rectangular box on the right labeled 'Student Achievement'.</p> </div> <p>NOTE: These examples are only a partial listing of publicly reported measures. You can generate a more complete list by repeating this process for each of the four goal areas. Some goal areas may not include publicly reported measures.</p>

Step	Action
<p>5. Identify other lagging performance measures</p>	<p>Work to expand the list of lagging measures by brainstorming, again using this second characteristic of lagging measures:</p> <ul style="list-style-type: none"> • Lagging measures are those that, once reported, offer little or no opportunity to improve the results in the measurement period by improving the performance drivers (leading measures). <p>Review each of the four outcome categories and generate a list of any other lagging measures which are not publicly reported for each goal areas.</p> <p>Check the new list for completion by:</p> <ul style="list-style-type: none"> • Ensuring that each of the goal areas has enough performance measures to adequately report the outcomes in that category • Ensuring that there are no leading measures in the list <p>After completing this step, you should have identified lagging measures for each goal area.</p>
<p>6. Identify performance drivers (leading measures)</p>	<p>Review each lagging measure and brainstorm their leading measures. Begin by explaining the definition:</p> <ul style="list-style-type: none"> • Leading measures are the performance drivers that would give the organization time to make changes that could impact the lagging measures. • All performance drivers (leading measures) can be monitored and measured in time to make changes to improve outcomes in the corresponding goal areas. <p>Example: Some performance drivers for the goal area of Student and Stakeholder Engagement include:</p> <ul style="list-style-type: none"> • Student ratings of culture • Extra-curricular participation rates in high school • Volunteer hours • Parent perception ratings • Special Program Local Option Sales Tax (SPLOST) increases
<p>7. Check the list of performance measures</p>	<p>As a final check of completeness, compare the list generated by the team to this module's Appendix, which provides a list of performance measures generated by a working group of Georgia school superintendents. Although it is not a complete list, it should help you to confirm that you have thoroughly considered the available options.</p>

Step	Action													
<p>8. Map the cause and effect linkages</p>	<p>Examine the linkages between each performance driver (leading measure) and lagging measure (major outcome). Graphically mark the linkages to create a “map” of drivers and major outcomes.</p> <p>Use self-sticking notes, flip charts, marker boards, index cards or other materials which allow you to draw arrows between drivers and outcomes and that, ideally, allow you to move around the drivers until you are satisfied with the linkages you have drawn.</p> <p>Linkage Map Example:</p> <table border="1"> <thead> <tr> <th data-bbox="451 642 727 709">Performance Driver (Leading Measure)</th> <th data-bbox="773 642 1078 709">Performance Measure (Lagging Measure)</th> <th data-bbox="1127 642 1295 709">Goal Areas/ Perspective</th> </tr> </thead> <tbody> <tr> <td data-bbox="467 751 781 842">Success on SAT Prep Course</td> <td data-bbox="829 751 1127 842">Increased SAT scores</td> <td data-bbox="1166 806 1446 915" rowspan="2">Student Achievement</td> </tr> <tr> <td data-bbox="467 905 781 995">Success on benchmark</td> <td data-bbox="813 905 1127 995">Improved CRT scores</td> </tr> <tr> <td data-bbox="467 1052 781 1142">Drivers reporting on time</td> <td data-bbox="813 1052 1127 1142">On time bus delivery</td> <td data-bbox="1166 1121 1458 1230" rowspan="2">Internal Processes</td> </tr> <tr> <td data-bbox="467 1184 781 1274">Survey of lunch quality</td> <td data-bbox="813 1184 1127 1274">Increased % of breakfast/lunch participants</td> </tr> </tbody> </table> <p>The diagram illustrates a linkage map with three columns: Performance Driver (Leading Measure), Performance Measure (Lagging Measure), and Goal Areas/Perspective. - In the 'Student Achievement' column, 'Success on SAT Prep Course' and 'Success on benchmark' are linked to 'Increased SAT scores' and 'Improved CRT scores' respectively. - In the 'Internal Processes' column, 'Drivers reporting on time' is linked to 'On time bus delivery', and 'Survey of lunch quality' is linked to 'Increased % of breakfast/lunch participants'. - Arrows indicate causal linkages: 'Success on SAT Prep Course' leads to 'Increased SAT scores', which leads to 'Student Achievement'. 'Success on benchmark' leads to 'Improved CRT scores', which also leads to 'Student Achievement'. 'Drivers reporting on time' leads to 'On time bus delivery', which leads to 'Internal Processes'. 'Survey of lunch quality' leads to 'Increased % of breakfast/lunch participants', which leads to 'Internal Processes'. There is also a bidirectional arrow between 'On time bus delivery' and 'Increased % of breakfast/lunch participants'.</p>	Performance Driver (Leading Measure)	Performance Measure (Lagging Measure)	Goal Areas/ Perspective	Success on SAT Prep Course	Increased SAT scores	Student Achievement	Success on benchmark	Improved CRT scores	Drivers reporting on time	On time bus delivery	Internal Processes	Survey of lunch quality	Increased % of breakfast/lunch participants
Performance Driver (Leading Measure)	Performance Measure (Lagging Measure)	Goal Areas/ Perspective												
Success on SAT Prep Course	Increased SAT scores	Student Achievement												
Success on benchmark	Improved CRT scores													
Drivers reporting on time	On time bus delivery	Internal Processes												
Survey of lunch quality	Increased % of breakfast/lunch participants													

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

Perform this practice on your own or with a peer. Using the data available for your organization*, and the other knowledge you have about the organization and the education field, work through the steps to generate a list of potential performance measures.

*If you are a school-level leader, use data from your school. If you are a district-level leader, use data from your school district.

Practice Worksheet

Brainstorm a list of lagging performance measures for each goal area.

Goal Area	Publicly Reported Measures	Measures Not Publicly Reported, But Provide No Time to Improve
Student Achievement		
Student and Stakeholder Engagement		
Internal Processes		
Learning and Growth of Faculty and Staff		

Practice Worksheet

List performance drivers (leading measures) for each lagging measure.

Lagging Measures:	Performance Drivers (Leading Measures):

Practice Worksheet

Show your combined results as a “map” with arrows to show the linkages between:
 (1) Performance drivers (leading measures) and lagging measures
 (2) Student achievement measures and the measures in other goal areas

Goal Area	Leading Measures (Performance Drivers)	Lagging Measures (Performance Measures)
Student Achievement		
Student and Stakeholder Engagement		
Internal Processes		
Learning and Growth of Faculty and Staff		

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. List of lagging performance measures for each goal area is present	<input type="checkbox"/> Includes all publicly reported performance measures <input type="checkbox"/> Includes additional performance measures that may not be publicly reported, but do not provide time to improve before results are reported <input type="checkbox"/> Each performance measure is listed in the appropriate goal area: Student Achievement, Student and Stakeholder Engagement, Internal Processes, and Learning and Growth <input type="checkbox"/> Does not include any performance drivers (leading measures) in any goal area <input type="checkbox"/> Includes enough performance measures for each goal area to adequately report outcomes in that category	<input type="checkbox"/> Yes <input type="checkbox"/> No

Topic 1: Generating Potential Performance Measures
Leading a Team to Select Performance Measures

Evidence	Criteria	Proficient? Give Feedback.
2. List of performance drivers (leading measures) for each goal area is present	<input type="checkbox"/> Includes a comprehensive list of performance drivers (leading measures) for each goal area <input type="checkbox"/> Includes a link between each performance driver and a lagging measure (all leading measures can be monitored, measured and acted upon in time to make changes to improve the outcome of one or more lagging measures)	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. A map illustrating the cause and effect linkages is present	<input type="checkbox"/> Arrows are used to show links between leading measures (performance drivers) and lagging measures (major outcomes) <input type="checkbox"/> Arrows are used to show links between goal areas	<input type="checkbox"/> Yes <input type="checkbox"/> No

Topic 2: Selecting Final Performance Measures

Selecting a Final List of Performance Measures

After brainstorming a list of potential performance measures that you can measure and monitor, you are ready to finalize the list.

While it would be ideal to monitor, measure, and report every measure of performance, too much data can be overwhelming. Selecting a subset allows you to focus on the measures that are most important to your mission, improvement needs, and public accountability requirements.

The first step in selecting key performance measures from your list of possible performance measures is to evaluate each possible measure on its own merit. By comparing each measure to a set of criteria, you can priority-rank the measures in order of their usefulness, availability and applicability. This will help you narrow down the list to the best key performance measures for your organization.

Once you have narrowed the list to your proposed performance measures, the final step is to evaluate the subset to make sure it is comprehensive enough to meet all your needs.

In this topic you will select final performance measures that you will use to manage your school or district and communicate internally and externally about performance.

What Resources are Required?

- The list of performance measures created in Topic 1
- Performance Measure Review 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. Open the meeting</p>	<p>Welcome and thank participants. Explain the purpose of the meeting. Review the agenda and answer questions.</p> <p>If working with the same group as in Topic 1, briefly review the concept of performance measures. If new participants are present, be sure they understand the concepts being discussed and the desired results of the process.</p>
<p>2. Review the purpose</p>	<p>Explain the rationale for this step in the process:</p> <p>While it would be ideal to monitor, measure and report every measure of performance, too much data can be overwhelming. Selecting a sub-set of key performance measures allows you to focus on the ones that are most important to your mission, improvement needs, and public accountability requirements.</p>
<p>3. Access list of possible performance measures</p>	<p>Introduce and briefly review the list of possible performance measures developed in Topic 1. Reference the map of relationships between performance measures.</p>

Step	Action
<p>4. Evaluate each performance measure</p>	<ul style="list-style-type: none"> • Consider one performance measure at a time. On page 1 of the Performance Measure Review Template, write the name of the performance measure being considered. • Evaluate the performance measure against the questions on the checklist, and mark the answers accordingly. The results that you mark on the checklist will show you whether the performance measure is ranked as A, B or C priority. • If a performance measure meets most or all of the following criteria, it will be marked Priority A: <ul style="list-style-type: none"> ○ Reported publicly and is consistent with school/district’s mission ○ Represents the most critical strategies of the school/district ○ Has significant impact on publicly reported measures such as standardized test scores ○ Drives the core business of the school/district, which is teaching and learning ○ Drives performance in an important area to a great extent, but does not otherwise meet the criteria for Priority A • If a performance measure meets the following criteria, it will be marked Priority B: <ul style="list-style-type: none"> ○ Drives the outcome(s) of one of the four goal areas, and impacts those outcomes to some extent • If a Performance Measure meets the following criteria, it will be marked Priority C: <ul style="list-style-type: none"> ○ Drives the outcome(s) of one of the four goal areas, but only minimally impacts those outcomes ○ Drives the outcome(s) of one of the four goal areas, but is not aligned with the improvement priorities of the current mission

Topic 2: Selecting Final Performance Measures
Leading a Team to Select Performance Measures

Step	Action
5. Priority rank the performance measures	<p>Use the results from page 1 of the Performance Measure Review Template to rank the performance measures from highest to lowest priority.</p> <p>From this list, select a number of measures to be your key, or most critical, performance measures. Select a manageable number of key performance measures—those that your organization can use easily and effectively to monitor its performance. Too many measures, or measures for which it is cumbersome to obtain data, will make the monitoring process more difficult.</p> <p>Once you have narrowed your list, write all the selected performance measures onto one list, as shown on page 2 of the template. This helps you confirm that you have the right number of performance measures (3-5) per goal area.</p>

Step	Action
<p>6. Evaluate the resulting set of key performance measures</p>	<p>Consider the resulting set of key performance measures as a whole. If your set of key performance measures meets all the criteria listed on page 3 of the Performance Measure Review Template, it is appropriate and viable. If not, use the “no” results to further hone your set.</p> <p>Does the set of performance measures include:</p> <ul style="list-style-type: none"> • All publicly reported lagging measures? • Enough data to provide the organization with the information to make decisions and changes while there is still time to positively impact critical lagging measures, especially regarding student achievement? • Sufficient leading measures (3-5) in all four goal areas: <ul style="list-style-type: none"> ○ Student Achievement ○ Student and Stakeholder Engagement ○ Internal Processes ○ Learning and Growth • Leading measures which have a relationship to the lagging measures of a magnitude that can directly impact performance within the time available? • Measures which reflect the success of the organization in: <ul style="list-style-type: none"> ○ Achieving its mission? ○ Operating effectively, efficiently, ethically and legally? ○ Stewarding its resources? ○ Serving the needs of its customers (students) and stakeholders (parents, community, taxpayers)? ○ Developing faculty and staff with the right mix of skills and tools? ○ Developing a climate that sustains improvement? • Measures for which data can be captured and that members of the organization are willing and able to collect? • Measures which potentially show both success and opportunities for continuous improvement?

Step	Action
7. Finalize the list of performance measures	<p>Briefly review the accomplishments of the meeting, and thank the participants for their input.</p> <p>Reiterate any outstanding issues and how you will resolve them (answers or information to follow, follow-up meetings, target dates, etc.). Ask if there are any other questions, and respond accordingly.</p> <p>Tell the team how the results of the meeting will be used, and what next steps they can expect.</p> <p>After your team meeting, use the results to independently generate a final list with all “A” Priority Measures, and enough “B” performance measures, to provide adequate data to inform decision making and communicate results in all four goal areas.</p>

Practice Exercise

Instructions

- Follow the steps in the Step-Action Table for this topic
 - Complete the Performance Measure Review Template (Appendix B), 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

Perform this practice on your own or with a peer.

Begin with the list of performance measures you have previously generated for each of the four goal areas: Student Achievement, Student and Stakeholder Engagement, Internal Processes, and Learning and Growth.

Using what you know about your organization, answer the questions in the Performance Measure Review Template and use the results to select a final set of performance measures.

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. Original list of potential performance measures is used as an input	<input type="checkbox"/> List of possible performance measures is referenced	<input type="checkbox"/> Yes
	<input type="checkbox"/> Map of relationships between performance measures is referenced	<input type="checkbox"/> No
2. Potential performance measures are reviewed individually to generate a priority ranking	<input type="checkbox"/> Each possible Performance Measure is reviewed individually	<input type="checkbox"/> Yes
	<input type="checkbox"/> Each Performance Measure is compared to the questions on page 1 of the Performance Measure Review Template	<input type="checkbox"/> No
	<input type="checkbox"/> Each Performance Measure is assigned a priority ranking of A, B or C based on the checklist results	
	<input type="checkbox"/> The set of performance measures is then organized into descending priority from A to C	

Topic 2: Selecting Final Performance Measures
Leading a Team to Select Performance Measures

Evidence	Criteria	Proficient? Give Feedback.
3. A preliminary set of performance measures is selected	<input type="checkbox"/> The highest-ranking performance measures are selected as key performance measures and are listed into one of the four key performance goal areas on page 2 of the template <input type="checkbox"/> Each goal area has between 3-5 key performance measures listed	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. The preliminary set of key performance measures is evaluated	<input type="checkbox"/> The list of key performance measures is compared to the questions on page 3 of the template <input type="checkbox"/> Issues resulting from answers of “no” are resolved <input type="checkbox"/> There are enough “yes” answers to signify that the selected set of key performance measures is adequate/appropriate	<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

Lead a team through the process of identifying performance measures that will be used to track progress in your organization.

Assemble a team of colleagues to work with you on this process. You and the team should use what you know about your organization (or the organizations they work in) in order to answer questions and make assumptions as you work through the process.

Lead the team through both steps of the process—brainstorming a list of potential performance measures, and then selecting a final list of performance measures.

Final Practice Worksheet

Brainstorm a list of lagging performance measures for each goal area.

Goal Area	Publicly Reported Measures	Measures Not Publicly Reported, But Provide No Time to Improve
Student Achievement		
Student and Stakeholder Engagement		
Internal Processes		
Learning and Growth of Faculty and Staff		

Final Practice Worksheet

List performance drivers (leading measures) for each lagging measure.

Lagging Measures:	Performance Drivers (Leading Measures):

Final Practice Worksheet

Show your combined results as a “map” with arrows to show the linkages between:
 (1) Performance drivers (leading measures) and lagging measures
 (2) Student achievement measures and the measures in other goal areas

Goal Area	Leading Measures (Performance Drivers)	Lagging Measures (Performance Measures)
Student Achievement		
Student and Stakeholder Engagement		
Internal Processes		
Learning and Growth of Faculty and Staff		

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. List of lagging performance measures for each goal area is present	<input type="checkbox"/> Includes all publicly reported performance measures	<input type="checkbox"/> Yes
	<input type="checkbox"/> Includes additional performance measures that may not be publicly reported, but do not provide time to improve before results are reported	<input type="checkbox"/> No
	<input type="checkbox"/> Each performance measure is listed in the appropriate goal area: Student Achievement, Student and Stakeholder Engagement, Internal Processes, and Learning and Growth	
	<input type="checkbox"/> Does not include any performance drivers (leading measures) in any goal area	
	<input type="checkbox"/> Includes enough performance measures for each goal area to adequately report outcomes in that category	

Evidence	Criteria	Proficient? Give Feedback.
2. List of performance drivers (leading measures) for each goal area is present	<input type="checkbox"/> Includes a comprehensive list of performance drivers (leading measures) for each goal area	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Includes a link between each performance driver and a lagging measure (all leading measures can be monitored, measured and acted upon in time to make changes to improve the outcome of one or more lagging measures)	
3. A map illustrating the cause and effect linkages is present	<input type="checkbox"/> Arrows are used to show links between leading measures (performance drivers) and lagging measures (major outcomes)	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Arrows are used to show links between goal areas	
4. Original list of potential performance measures is used as an input	<input type="checkbox"/> List of possible performance measures is referenced	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Map of relationships between performance measures is referenced	
5. Potential performance measures are reviewed individually to generate a priority ranking	<input type="checkbox"/> Each possible Performance Measure is reviewed individually	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Each Performance Measure is compared to the questions on page 1 of the Performance Measure Review Template	
	<input type="checkbox"/> Each Performance Measure is assigned a priority ranking of A, B or C based on the checklist results	
	<input type="checkbox"/> The set of performance measures is then organized into descending priority from A to C	

Evidence	Criteria	Proficient? Give Feedback.
6. A preliminary set of performance measures is selected	<input type="checkbox"/> The highest-ranking performance measures are selected as key performance measures and are listed into one of the four key performance goal area on page 2 of the template <input type="checkbox"/> Each goal area has between 3-5 key performance measures listed	<input type="checkbox"/> Yes <input type="checkbox"/> No
7. The preliminary set of key performance measures is evaluated	<input type="checkbox"/> The list of key performance measures is compared to the questions on page 3 of the template <input type="checkbox"/> Issues resulting from answers of “no” are resolved <input type="checkbox"/> There are enough “yes” answers to signify that the selected set of key performance measures is adequate/appropriate	<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
<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
9.	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**

Gather a team of colleagues (preferably leaders) in your current school or district. Gather the information about your organization that is required for the process of selecting performance measures.

Prepare for a meeting (or series of meetings) in which you will lead the team through the processes you learned in this module. Acting as facilitator, lead the team through the process of generating a list of potential performance measures, then selecting a balanced, final list of performance measures. You and your team should use what you know about your organization to answer the questions and perform the tasks that arise during the process.

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. List of lagging performance measures for each goal area is present	<input type="checkbox"/> Includes all publicly reported performance measures <input type="checkbox"/> Includes additional performance measures that may not be publicly reported, but do not provide time to improve before results are reported <input type="checkbox"/> Each performance measure is listed in the appropriate goal area: Student Achievement, Student and Stakeholder Engagement, Internal Processes, and Learning and Growth <input type="checkbox"/> Does not include any performance drivers (leading measures) in any goal area <input type="checkbox"/> Includes enough performance measures for each goal area to adequately report outcomes in that category	<input type="checkbox"/> Yes <input type="checkbox"/> No

Evidence	Criteria	Proficient? Give Feedback.
2. List of performance drivers (leading measures) for each goal area is present	<input type="checkbox"/> Includes a comprehensive list of performance drivers (leading measures) for each goal area	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Includes a link between each performance driver and a lagging measure (all leading measures can be monitored, measured and acted upon in time to make changes to improve the outcome of one or more lagging measures)	
3. A map illustrating the cause and effect linkages is present	<input type="checkbox"/> Arrows are used to show links between leading measures (performance drivers) and lagging measures (major outcomes)	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Arrows are used to show links between goal areas	
4. Original list of potential performance measures is used as an input	<input type="checkbox"/> List of possible performance measures is referenced	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Map of relationships between performance measures is referenced	
5. Potential performance measures are reviewed individually to generate a priority ranking	<input type="checkbox"/> Each possible Performance Measure is reviewed individually	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Each Performance Measure is compared to the questions on page 1 of the Performance Measure Review Template	
	<input type="checkbox"/> Each Performance Measure is assigned a priority ranking of A, B or C based on the checklist results	
	<input type="checkbox"/> The set of performance measures is then organized into descending priority from A to C	

Evidence	Criteria	Proficient? Give Feedback.
6. A preliminary set of performance measures is selected	<input type="checkbox"/> The highest-ranking performance measures are selected as key performance measures and are listed into one of the four key performance goal area on page 2 of the template <input type="checkbox"/> Each goal area has between 3-5 key performance measures listed	<input type="checkbox"/> Yes <input type="checkbox"/> No
7. The preliminary set of key performance measures is evaluated	<input type="checkbox"/> The list of key performance measures is compared to the questions on page 3 of the template <input type="checkbox"/> Issues resulting from answers of “no” are resolved <input type="checkbox"/> There are enough “yes” answers to signify that the selected set of key performance measures is adequate/appropriate	<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
9.	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: Potential Sources of Performance Measurement Data

Student Achievement	
<ul style="list-style-type: none"> • ACT scores and participation rates • Adequate Yearly Progress results (AYP) • After-school tutorial data • Alternative School Placement data • AP Exam participation rates and Scores • Benchmark/interim exam data • Classroom and standardized trend data • Classroom assessment data • Class size data • Criterion referenced test (CRCT) reports • Diploma type data • Discipline data • Drop out/completion rates • Extracurricular participation data • GKAP reports • HS graduation follow-up data – Job and college placement • Honors Participation • Hope Scholarship retention data • HSGT reports • Individual and group classroom data • Instructional program data • Interscholastic participation data • Intervention Program data • Leader classroom observation data 	<ul style="list-style-type: none"> • Lexia CRT data • Mobility and Stability data • National Assessment of Educational Progress (NAEP) reports • National Merit Scholars data • Norm-referenced test reports • Promotion and retention data • PSAT scores and participation rates • Report card/progress report data • Research, assessment and evaluation data • Remediation requirements and results • SACS results • SAT scores and participation rates • School achievement data from Office of Student Accountability (OSA) report of school vs. like schools • School results against best in class (national comparison) benchmarks • State Writing Assessments • Student classroom benchmark data by teacher • Student information system data • Student standardized achievement data by teacher • Sub-group performance data

Student and Stakeholder Engagement

- Application and enrollment trends
- Attendance/tardy data
- Climate survey data: faculty and staff, parents, students, community
- Quality
- Safety
- Environment
- Community involvement data
- Crime and violence Incident data
- Extra-curricular participation data
- Marketing and public relations data
- Organization participation data
- Parent communication data
- Parent involvement data
- Perception data
- PTA contribution data
- Public engagement data: School Council, PTSA, volunteers, business partners and Civic groups, interagency partnerships
- Truancy data

Appendix A: Potential Sources of Performance Measurement Data
Leading a Team to Select Performance Measures

Internal Processes	
<ul style="list-style-type: none"> • General <ul style="list-style-type: none"> ○ Customer/stakeholder perception • Human Resources <ul style="list-style-type: none"> ○ Employee survey data ○ Instructional vacancy data ○ Recruiting data • Transportation <ul style="list-style-type: none"> ○ Average useful life – by vehicle type ○ Breakdowns ○ Cost per student trip ○ Expense per mile ○ Miles per bus ○ Miles per mechanic ○ Miles traveled ○ On-time bus arrival ○ Transportation (cont.) ○ Preventable accidents ○ Student trips ○ Variable costs per mile • School Nutrition Program <ul style="list-style-type: none"> ○ Free and reduced lunch data ○ Health and sanitation scores ○ Meal participation rates ○ Meals per labor hour ○ Percent direct supply cost per meal ○ Percent labor cost per meal ○ Percent other costs per meal ○ SNP budget status 	<ul style="list-style-type: none"> • Financial Operations <ul style="list-style-type: none"> ○ Audit Report data ○ Budget to actual variance ○ Direct instruction as percent of total expenditures ○ Fund balance ○ General administration percent of total expenditures ○ Instruction as percent of total expenditures ○ Instructional services as percent of total expenditures ○ Media services as percent of total expenditures ○ Per pupil expenditure data ○ Pupil services as percent of total expenditures ○ Revenue and grant data ○ Risk Management data • Facilities Services and Construction <ul style="list-style-type: none"> ○ Construction cost data ○ Construction schedule data ○ Emergency Preparedness Audit data ○ Facilities audit data ○ Facility inspection results ○ Facilities ratings data ○ Revenue and grant data ○ Risk Management data ○ School capacity data ○ Work order data

Learning and Growth

- Grievance data
- National Board Certification
- Professional Ability test reports
- Professional Development Plan data
- Professional learning
- Retention data
- Teacher/department reports
- Teacher data:
 - Attendance
 - Certification
 - Education level
- Teacher walk-through data
- Technology modernization data
- Technology usage data
- Transfer request data

Appendix B: Performance Measure Review Template

Directions: Evaluate each Performance Measure by checking off all statements that apply. The results will indicate its priority ranking: A, B or C.

Performance Measure: _____

- Performance Area:** (Check all that apply)
- Student Achievement
 - Student and Stakeholder Engagement
 - Internal Processes
 - Learning and Growth

It is publicly reported.

It represents one of the most critical strategies of our school/district.

It has significant impact on publicly reported measures (e.g. test scores).

It drives the core business of the school/district (teaching and learning).

It drives performance in an important area to a great extent – but, it does not meet the other criteria for Priority A.

	A

It drives the outcome(s) of one of the 4 performance areas, and impacts those areas to some extent.

	B

It drives the outcomes of one of the 4 performance areas, but only minimally impacts those outcomes.

	C

It drives the outcomes of one of the 4 performance areas, but is not aligned with the current improvement priorities/mission of the school/district.

Appendix B: Performance Measure Review Template
 Leading a Team to Select Performance Measures

Directions: Once you have priority-ranked your performance measures, list them here. You should have 3-5 key performance measures in each of the four goal areas.

Student Achievement	1.
	2.
	3.
	4.
	5.
Student And Stakeholder	1.
	2.
	3.
	4.
	5.
Internal Processes	1.
	2.
	3.
	4.
	5.
Learning And Growth	1.
	2.
	3.
	4.
	5.

Directions: Evaluate your set of selected key performance measures, as a whole, by asking the questions listed below. If you have any “no” answers, try to resolve those issues. When you can answer all or most of the questions “yes,” your set is appropriate.

Does this set of performance measures include:

All publicly reported lagging measures? Yes No

Enough data to provide the organization with the information to make decisions and changes while there is still time to positively impact critical lagging measures – especially regarding student achievement? Yes No

Sufficient leading measures (3-5) in all four key areas of school/district performance? Yes No

Leading measures which have a relationship to the lagging measures, of a magnitude that can directly impact performance within the time available? Yes No

Performance measures that reflect the success of the organization in:

Achieving its mission and vision? Yes No

Operating efficiently, effectively, ethically and legally? Yes No

Stewarding its resources? Yes No

Serving the needs of its customers (students) and stakeholders (parents, community, taxpayers, etc.)? Yes No

Developing faculty and staff with the right mix of skills and tools? Yes No

Developing a climate that sustains improvement? Yes No

Performance measures for which data **can be captured** and that members of the organization are **willing and able to collect**? Yes No

Performance measures which potentially show both success and opportunities for continuous improvement? Yes No

Recommended Reading and Resources

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.

Acknowledgments

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