

# ***Engagement for Success:***

## **Leveraging the Balanced Scorecard in Candler County**

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### **Overview**

#### ***Innovation at a Glance***

In 2007, with a new superintendent, a school board with a focused desire to improve student performance, and a willing and motivated leadership team, the Candler County School District began its journey to strategically and systemically improve organizational and student performance. Through implementation of a Balanced Scorecard, the school system moved from the traditional compliance-based model found in many schools to one which is focused on systemically improving student performance, from board to leadership, teacher to student, and boardroom to classroom.

#### ***Impact at a Glance***

The impact of implementing the Balanced Scorecard has been noteworthy throughout the organization, particularly in the areas of process improvement and governance and leadership, and has resulted in significant systemic change:

- **Process Improvement**—The Balanced Scorecard became the integrating tool enabling compliance with requirements facing the system, from School Improvement Plans and the System Improvement Plan, and Georgia Performance Standards (GPS), and SACS/CSI Accreditation Standards. Professional learning became aligned with district improvement strategies, and budget development; resource allocations became driven by improvement areas identified in the Balanced Scorecard.
- **Governance and Leadership**—The school board and the superintendent worked as a team, a team like few school systems enjoy. Board meetings were focused on Balanced Scorecard performance and improvement. Improvements were not focused on the interests of board member constituents, but on the identified Balanced Scorecard performance objectives.
- **Systemic Change**—As a result of the process improvements and the strategic engagement of the school board, systemic change resulted. Business was no longer “business as usual.” Not only did all internal stakeholders become aligned with the district objectives, but the Balanced Scorecard provided transparency for external stakeholders as well, resulting in significant improvement in stakeholder engagement and cooperation.

### **The Impact Story**

#### ***Background***

Candler County School District is a relatively small school system in southeastern Georgia, typical of many small school systems in Georgia—one high school, one intermediate school, one middle school, and one elementary school, serving approximately 1,800 students. In the 2006-2007 school year, the district did not make Adequate Yearly Progress (AYP), and only one school made AYP.

The district also had a new superintendent and a heightened sense of urgency to make a difference in the performance of not only the students, but also the organization.

Other demographics of the county include:

- Population of approximately 11,000
- Relatively high percentage (43%) of non-high school graduate parents
- Per capita income of approximately \$22,000, significantly lower than the state average
- Predominantly low wealth (62%) student population
- Ethnic breakdown of approximately 52% Caucasian, 32% black, and 14% Hispanic.
- About 15% students with disabilities, 5% of which are English Language Learners

The Balanced Scorecard is an organizational performance measurement and improvement tool developed in 1992 by Harvard Business School professors Robert S. Kaplan and David P. Norton. It began as a tool to enhance traditional measures used to evaluate for-profit organizational performance. Subsequently, it was adopted in the not-for-profit arena, in schools, colleges, and non-profit organizations. Not only a performance measurement and improvement tool, the Balanced Scorecard became the strategic planning system in many organizations, eliminating the need for a traditional strategic plan. GLISI introduced the Balanced Scorecard to Georgia school districts in 2002, and this tool has been subsequently adopted in many systems across Georgia.

### **What Was Done?**

In 2007 the Candler Governance Team (Board of Education) and the District Leadership Team, led by the superintendant, began their Balanced Scorecard journey to strategically and systemically improve performance across the organization with aligned focus and common performance objectives. The Balanced Scorecard process, as refined by GLISI, is a disciplined step-by-step process that begins with the development of performance foundations, the strategic footing of the organization, and ends with the establishment of accountability for each outcome, strategies for improvement, and the assignment of appropriate resources to ensure success.



The first step in the process began with the Board of Education and key district leaders participating in a retreat focused on developing Performance Foundations for the school district – Mission, Beliefs and Vision. The one day retreat resulted in the codification of a mission, beliefs, and vision for the district that all stakeholders agreed to and could support. To read the mission, beliefs, and vision, please refer to the appendix.

During the foundation development process, the Board provided policy guidance and governance and participated actively in providing strategic direction. With this solid strategic beginning and stakeholder involvement, the District Leadership Team continued on steps two and three of the Balanced Scorecard journey, transforming the district's vision into Strategic Goal Areas and Performance Objectives.

The District Leadership Team then developed organizational Performance Objectives within each of the Strategic Goal Areas in order to execute its strategy and achieve desired results.

#### **Candler County Strategic Goal Areas and Performance Objectives**

##### *Goal Area 1 – Academic/Student Performance*

- Improve the Graduation Rate
- Improve Mastery Learning of GPS
- Reduce Achievement Gaps

##### *Goal Area 2 – Student, Parent, Community Involvement*

- Improve Student Attendance
- Improve Student Engagement
- Increase Parent Involvement
- Increase Community Involvement

##### *Goal Area 3 – Internal and External Processes*

- Improve the Instructional Process
- Advance the Use of Instructional Technology
- Maintain a Superior Instructional Environment
- Improve Support Processes
- Improve Resource Management

##### *Goal Area 4 - Collaboration, Teamwork, and Professional Growth*

- Improve Employee Development and Leadership Capacity
- Develop a Positive Organizational Culture and Belief System
- Improve Staff Attendance
- Improve Organizational Communications – Internal and External

With this strategic framework in place, the District Leadership Team continued to define the strategic direction by establishing multiple Performance Measures or standards for each Performance Objective, developing SMART Targets for each Performance Measure, forming strategies to accomplish the SMART Targets, and providing resources to execute the strategies. Finally, accountability for each outcome was given to each responsible individual.

As the Balanced Scorecard was introduced across the district, the District Leadership Team cascaded the Balanced Scorecard to the schools and presented the scorecards to a GLISI Performance Consultant. Principals developed school Balanced Scorecards with their teachers and staff using a process that was similar to one used by the district leadership team. As schools implemented the Balanced Scorecard, teachers and staff developed an aligned focus on the system vision and performance objectives. This aligned focus became manifested in strategies developed at the district and school, and executed at the school level.

## ***What were the Results?***

As the Balanced Scorecard was implemented over a period of several months, results came gradually at first but soon gained momentum. A few examples follow:

### **Student Achievement:**

- The high school graduation rate increased from 59% in 2007 to 79% in 2009.
- The number of schools making Adequate Yearly Progress increased from one in 2007 to three of four in 2009.
- In the area of Math in grades 1-8, Candler County moved from an average ranking of ninth in the RESA in 2008 to an average ranking of fourth in the RESA in 2009, a jump of five positions in a single year! More significantly, when the Balanced Scorecard process began, the system strategic focus was literacy. As performance improved in Reading and ELA, the focus shifted to Math.

### **Student and Stakeholder Engagement:**

- Student attendance improved across all schools.
- Stakeholders support the superintendent and the board, through elections and public meetings.

### **Governance and Leadership:**

- In 2008, the Candler County School Board was invited to present at the National School Board Association Conference. The presentation focused on the performance improvement that resulted from implementation of the Balanced Scorecard.
- In 2009, the Candler County Board of Education was one of only 15 School Boards in the state of Georgia to receive recognition as a School Board of Distinction.

### **Internal and External Processes:**

- After schools analyzed the Balanced Scorecard performance data, they established “hot spots” for areas requiring special emphasis.
- The Balanced Scorecard became the integrating document for the many compliance requirements facing the system: School Improvement Plans, System Improvement Plan, Georgia School Keys, Georgia Performance Standards (GPS), Federal Consolidated Application, and the SACS/CASI Standards.
- Every school board meeting became centered around the Balanced Scorecard, and the board's agenda reflects this. In addition, prior to every board meeting, a focused discussion takes place around a specific Balanced Scorecard performance area.
- During the annual budget development cycle, all resource decisions are framed in the context of impact on Balanced Scorecard Performance Objectives.
- During the August-September timeframe, after performance data has arrived and been analyzed, the board meets with the leadership team to develop performance focuses on the Balanced Scorecard for the upcoming academic year.
- Performance Evaluations, from the superintendent's office to the school, are tied to Balanced Scorecard performance.
- Principal and Central Office Staff Leadership Meetings are held quarterly with the superintendent, with discussion focused on each school's performance measures and the progress toward the established targets.

## ***What was the Impact?***

Buckminster Fuller once said: “If you want to teach people a new way of thinking, don't bother to lecture them. Instead, give them a new tool, which will lead to new ways of thinking.” This is the

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profound impact that implementation of the Balanced Scorecard has had in the Candler County School District. The implementation of the Balanced Scorecard in Candler County has changed the organization from the traditional compliance-based model found in many school systems, to a school system that is focused systemically on improving student performance, from Board to leadership to teacher to student. The impact to Candler County is more than just increasing student achievement and higher accountability. The district experienced changes in their organizational structures and processes that have led to collaboration among educators and a commitment to systemic change.

#### **Collaboration, Teamwork, and Professional Growth:**

- Professional learning became aligned with improvement strategies instead of the traditional stand alone program.
- Professional Learning Communities in the areas of special needs and math were established to support improvement strategies.
- After schools analyzed Balanced Scorecard performance data, they established “hot spots” for areas requiring special emphasis.
- Through the common focus, vertical teaming took on a new meaning and School Improvement Plans became aligned from Pre-K to 12.

**Systemic Change:** While the measureable results are significant, of greater importance are the systemic and lasting impacts on the school system’s processes, leadership, and governance. Candler County has a new, formalized process for strategic planning and for reviewing their progress on measures important to the school district.

**Alignment with SACS/CASI Standards for Quality School Systems:** By developing a comprehensive performance model, the SACS/CASI Standards for Quality School Systems are embedded in the Balanced Scorecard Process. Virtually every SACS standard has been addressed through the Balanced Scorecard process, beginning with Vision, Leadership and Governance and ending with Continuous Improvement.

#### **Next Steps**

Unlike the traditional strategic plan, the Balanced Scorecard will not be revised every three to five years. Instead, it will undergo strategic change as conditions and performance change. When the Balanced Scorecard was initiated, performance dictated a focus on literacy; as literacy performance improved, the Balanced Scorecard dictated a new focus on math. This agility is critical for a high-performing organization.

Every year is a new chapter in the Candler County strategy for improving student and organizational performance. As internal and external conditions change and performance shortcomings evolve, so goes the focus of the Balanced Scorecard. The open, transparent focus on necessary improvement will continue to give this district significant inroads in meeting ever increasing standards and accountability.

## Appendix

### **Candler County's Mission, Beliefs, and Vision Statements**

*Mission:*

- Our mission is to stimulate growth in student achievement by continuing efforts to advance the development of all stakeholders-students, parents, staff, and the community.

*Beliefs: We believe and are committed to:*

- Continuously improving the graduation rate
- An aligned standards-based curriculum, instruction, and assessment that provides for extended learning opportunities for all students
- Effective teaching that energizes and maximizes active learning for all students
- Significantly improving the literacy level of all students
- Data driven, collaborative decision-making
- Professional growth for all of our colleagues
- Parent and community involvement to enhance learning

*Vision:*

- Our vision for Candler County Schools is for all students to meet or exceed Georgia Accountability measures, for the graduation rate to continuously improve to 80% and above, and for the system to be ranked in the top quartile of comparable systems in Georgia.
- We will accomplish this vision with high expectations, significantly improved literacy practices, and multiple interventions, as well as community and parent engagement and alignment from Pre-K to 12.
- As a result of our success, we will attract high performing teachers and new business and industry, and our graduates will be prepared to continue post-secondary options or pursue gainful employment.