

Monroe County School District

Balanced Scorecard

2006-2007



*BUILDING BRIDGES
TO SUCCESS*

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Introduction

In the spring of 2005 the superintendent, senior district staff and principals studied and developed the draft Monroe County School District Balanced Scorecard. The Balanced Scorecard (BSC) has a three-fold purpose. It is intended to serve as a: measurement tool; a management tool; and a communication tool.

This team of educational leaders initially identified the strengths, weaknesses, opportunities and threats to the school system and made recommendations for modification to the district mission and vision statements. They then developed three goal areas (or buckets) which would create the structure of the Balanced Scorecard. The areas are Student Achievement, Stakeholder Involvement and Support and Organizational Effectiveness. Performance Objectives as well key performance measures (indicators) were created for each of the goal areas and included metrics to be used in reporting.

The Balanced Scorecard is used as a driving force in developing the district budget. Departments and schools propose strategic initiatives including actions plans, balanced scorecard references, and budgets. This process insures alignment of strategies and resources.

Description of the Balanced Scorecard

Communication is an essential ingredient in the effectiveness of any results-oriented institution or organization. The public desire for accountability requires that the communicated results are very clear, direct, focused and consistent. To reach this end a strategic approach to performance management must be employed. It is imperative that the approach is aligned, data-driven, action-planned, monitored and reported in a timely manner.

One of the leading performance management methodologies in business has been the use of a Balanced Scorecard developed by Robert Kaplan and David Norton of Harvard University. The Balanced Scorecard has become a roadmap that measures performance and translates strategies into action plans. Decision-makers are therefore better able to monitor their organizations and focus on the measures critical to their success. A study conducted by Renaissance Solutions in association with Robert Kaplan of the Harvard Business School indicated that ninety percent of the companies surveyed, stated that an action-oriented understanding of an organization's strategy could significantly influence that organization's success. The survey also indicated that less than sixty percent of senior managers and less than ten percent of the total company had a clear understanding of the company's strategy.

After ascribing to the mission (the purpose of the organization) and vision (the word picture of the organization), the first step in developing a Balanced Scorecard is the determination of what matters, or what is important, and not what is necessarily easy to measure. The Balanced Scorecard provides a dashboard of information on the status of district areas of emphasis. These areas, referenced in the August 2003 OPPAGA

Monroe County District Digest of Best Financial Practices Review, include “not only educational services, but also educational support programs.”

Key performance indicators are identified in each area and categorized as leading or lagging. Using these indicators, baseline data is established, as well as, measurable targets. Action plans are then developed and implemented using the Balanced Scorecard as a monitoring device and funding is requested using the BSC as rationale. Individuals within the organization develop their personal objectives from the BSC thus linking organizational and individual performance. The district Balanced Scorecard is cascaded to departments and schools where additional leading and lagging indicators are identified.

School systems which have used this methodology have increased their organizational effectiveness and efficiency through this alignment process; have been able to communicate more effectively to their general and business communities; and documented their accountability.

Mission and Vision Statements

Over the years the District mission and vision statements have been revised to meet the needs of a changing society. These statements create the basis upon which the district strategies are formulated.

Mission: *“We provide an educational experience in a safe and nurturing environment that results in student success; promotes ethical, healthy decision making; and empowers good citizens to become lifelong learners.”*

Vision: *All students succeed in academic, artistic and athletic endeavors. They are good citizens. The climate is healthy, and the environment is safe and nurturing. Every employee is appreciated, highly qualified, an effective communicator, and improves continuously to meet emerging needs of students. Each campus is safe, beautiful, and well-equipped for maximum learning. Parents and guardians are active partners in their students' education. Communication is strong. There are well-established collaborative relationships with all people who care for children, including childcare centers, preschools, social service agencies, community members, businesses, organizations and institutions of higher education. Strong fiscal management and adequate funding ensure continuous improvement. Every member of this school community understands his or her role in achieving the desired results. Each contributes and share responsibility for the learning and well-being of all.*



Monroe County School District Strategic Budgeting Framework

Mission



Vision



District Strategic Plan



District Balanced Scorecard

Student
Achievement

Stakeholder
Loyalty &
Engagement

Organizational
Effectiveness



District
Strategic Budget



School/Department
Balanced Scorecards

Monroe County School District

Balanced Scorecard - Key Terms

Accessible Electronic Personnel Files – All files pertaining to the area of human resources maintained and available in the Personnel Department on-demand for viewing, emailing or printing.

Achievement Gap- Achievement gap measures the percentage of Black and Hispanic students versus White students in grade 3-10 that score at Level III or above on the reading and math SSS portion of the FCAT.

Adequate Resources for Instruction – Percentage of Faculty/Staff respondents' rating instructional resources as adequate in the Climate Survey.

Advanced Placement Exam – An exam administered at the conclusion of a course offered by The Advanced Placement Program®. These courses provide motivated high school students with the opportunity to take college-level courses in a high school setting. Students who participate in the Program not only gain college-level skills, but in many cases they also earn college credit while they are still in high school. AP courses are taught by dedicated and enthusiastic high school teachers who follow course guidelines developed and published by the College Board.

AYP (Adequate Yearly Progress) - Adequate Yearly Progress (AYP) measures the progress of all public schools, and school districts toward enabling all students to meet the State's academic achievement standards. AYP measurements target the performance and participation of various subgroups based on race or ethnicity, socioeconomic status, disability, and English proficiency. The goal of NCLB is to have 100 percent of students proficient by 2013-14.

Affordable Housing – Number of housing units available for MCSD employees that meet affordable guidelines as defined by the county or municipality which it exists.

Balanced Scorecard – Measures that show the results of the organization and reflect a balanced view of performance. It is a measurement, monitoring and communication tool.

CCAPS (College and Career Placement Specialists) – Specialized counselors in the high school to assist school personnel, parents, and students with relevant educational and personal/social goals and develop and implement effective programs for all students. The primary responsibilities of this individual include advertising and disseminating information about careers, college and technical school admissions, providing assistance with college testing (PSAT/SAT, ACT), scholarships and awards to students and parents/guardians, and becoming familiar with college admission requirements and documentation necessary to ensure successful placement of students.

Change Orders for Completed Projects – Total Number of change order dollars for Completed projects in the fiscal year divided by the total number of dollars budgeted.

Climate Survey – An electronic survey (also available in hard copy) sent to parents, teachers and students.

Community Business Partnerships – Entities contributing time, money, and/or services to schools and/or the school district (includes Adopt-A-Classroom and Sponsor-A-Classroom participants).

Construction Projects Completed on Time – Determination made if punch list is completed within 60 days of reception of the Certificate of Occupancy

CTE's (Career and Technical Education) Certification -Career Path to earn a high school diploma with 3 CTE classes in the same program industry recognized certification that will make them more employable in the workforce. Examples:

Culinary	Pro-Start Certification
Early Childhood	CDA Certification
Automotive	NATEF Certification
Marine	ABYC Certification
Nails	State License
Cosmetology	State License

Custodial Costs per Square Foot -This figure is derived as follows. Custodial cost is established as Objects 0001 and 0002 of Function 7900 in the budget. This will include all salaries, supplies, equipment, and outsourced work. This will not include utilities and other items not related to the cleaning of the facilities. Square footage is based on areas the district operates. The square footage data is taken from the Florida Inventory of School Houses (FISH). Vacant buildings and buildings not operated by the district are not included in the total.

Drop-Out Rate – In Florida, a dropout is defined as a student who withdraws from school for any of several reasons cited in statute without transferring to another school, home education program, or adult education program. Dropout withdrawal reasons include voluntary withdrawal from school prior to graduation (e.g., after passing the age of compulsory school attendance); failure to meet attendance requirements due to excessive absenteeism; discontinuance of attendance with whereabouts unknown; failure to enter/attend school as expected after having previously registered; and certain other reasons. The dropout rate is calculated and reported for all children in grades 9-12 who drop out of school.

Dual Enrollment - The dual enrollment program is the enrollment of an eligible secondary student or home education student in a postsecondary course creditable toward high school completion and a career certificate or an associate or baccalaureate degree. (§1007.271 f.s.)

Ed- Connect Messages – A telephone communication to a target group from district administrators, principals and /or teachers

Eligible Instructional Staff Retained – Instructional staff who have been recommended to return by their supervising principal for the following school year and approved by the School Board

Emergency Work Orders – Maintenance requests requiring immediate attention

Facility Cleanliness Assessment Rating – Sites are reviewed three times a year by the Assistant Directors of Facilities. One review is prior to the beginning of the school year, one in January, and one in April. The review is a spot check inspection. One or two random rooms will be visited. Each site is assigned a numbered grade based on an evaluation guide. The grades are as follows: Exemplary, very high quality of care (like a high end hotel or hospital) =3; Good, Safe and well cared for like a well run facility (like a typical nice mall) =2; Acceptable, many items found needing attention but serviceable (like a strip shopping center or a mega store) =1; Not acceptable, Items found unsafe, unkempt, and not suitable for student education. (like the corner gas station) =0. Detailed descriptions of grading guide are available.

Facility Maintenance Assessment Rating - Sites are reviewed three times a year by Director of Facilities, Director of Construction, and Building Official. One review is prior to the beginning of the school year, one in January, and one in April. The review is a spot check inspection. One or two random rooms will be visited. Each site is assigned a numbered grade based on an evaluation guide. The grades are as follows: Exemplary, very high quality of care (like a high end hotel or hospital)= 3; Good, Safe and well cared for like a well run facility (like a typical nice mall)= 2; Acceptable, many items found needing attention but serviceable (like a strip shopping center or a mega store)=1; Not acceptable, Items found unsafe, unkept, and not suitable for student education. (like the corner gas station)=0

Incidents of Aggressive Behavior (grades 6-12) – The total number of fighting incidents is a total of the School Environment Safety Incident Report (SESIR) categories:

- Fighting – Mutual combat, mutual altercation
- Battery – The physical use of force or violence by an individual against another
- Threat/Intimidation-Instilling fear in others
- Bullying/Harassment- Intimidating of hostile behaviors

FCAT – SSS – The FCAT is a test given to Florida students to measure what they know and are able to accomplish in reading, writing, mathematics, and science. The test is part of Florida's plan to improve student achievement. A portion of the test (known as the FCAT - SSS) is designed to measure the challenging content standards defined in the Sunshine State Standards.

Florida A+ Plan – The Florida A+ plan for education has three major parts - one addressing accountability and improving student learning, one to raise standards and improve training for educators, and one to improve school safety and reduce truancy. The portion of the plan dealing with school accountability (also known as the School Recognition Program) has become the main component and was built upon two principles: each student should gain a year's worth of knowledge in a year's time in a Florida public school and that no student will be left behind. The highlights of the A+ Plan are:

- Accountability
- Choices for Parents
- More resources
- Rewards for improvement and success
- Change when students are not progressing

FKCC Community Education Program –A partnership with FKCC and the Monroe County School District that is designed to offer local residents the opportunity to explore various Career offerings that include: culinary, web design, construction, auto mechanics, ceramics, Microsoft Office, marine mechanics, and video productions. The goal of the program is to offer non credit enrichment classes that could lead to credited classes in the future.

Goal Areas (Buckets) –

Student Achievement – The performance of students as measured by academic and pupil progression standards.

Stakeholder Involvement and Support – Ongoing involvement and communication between and among stakeholders (students, staff, and community) in the operation of the school district.

Organizational Effectiveness – Best practices including budgeting, accounting, facility construction and management, transportation, personnel, technology and data management. Increase in faculty and staff learning to ensure the cooperative and effective transfer of information within the system.

Graduation Rate – The number of graduates (taken from the cohort group of first-time ninth graders in the fall of a given year four years prior to the year of graduation plus subsequent incoming transfers on the same schedule to graduate divided by the number of first-time ninth graders in membership during the fall of a given year four years prior to the year of graduation plus incoming transfer students on the same schedule to graduate minus students from this combined population who transferred out, students who left to enroll in a private school, a home education program, or an adult education program and deceased students

Highly Qualified Paraprofessionals – All paraprofessionals (teacher aides) will have, in order of preference, an AA/AS degree, 60 semester hours, or have a passing score on the ParaPro exam.

Highly Qualified Teachers – All instructional personnel will have certification in the area in which they teach, including endorsements such as ESOL and Reading.

Inservice Points per Employee –

Instructional Staff – Level 1 (teachers, media specialists, etc.) – 24 points

Instructional Staff – Level 2 (aides, computer managers, media managers, etc.) – 10 points

Non-instructional Staff – indirect impact (custodial, cafeteria, bus drivers, etc.) - 10 points

Administrative Staff (Instructional) – Direct impact on instruction (principals, assistant principals, program specialists, etc.) – 24 points

Administrative Staff (Non-Instructional) – Business and district administrative personnel not involved directly with instruction – 10 points

Instructional Expenditures – Direct Cost classroom expenditures (Florida Department of Education function 5XXX) from the Annual Cost Report.

Key Performance Indicators (Measures) – Significant measures used to report progress toward the accomplishment of targeted objectives

Lagging Indicators – Results that can not be changed and document whether a target has been met.

Leading Indicators – Predict results and are also known as performance drivers. They indicate the amount of progress toward the target and allow for adjustment of strategy.

Maintenance Cost Per Square Foot – This figure is derived as follows. Maintenance cost is established as Objects 0001 and 0002 of Function 8100 in the budget. This will include all salaries, supplies, equipment, and outsourced work. This will not include construction and other items not related to the maintenance of the facilities. Square footage is based on areas the district operates. The square footage data is taken from the Florida Inventory of School Houses (FISH). Vacant buildings and buildings not operated by the district are not included in the total.

Meals per Labor Hour – Annual total hours worked divided by the annual total meals served (students and adults)

PATS (Paperless Application Tracking System) – An online application process that allows applicants to complete their application at their convenience either in whole or parts at a time and gives them ability to attach documents such as resumes, transcripts, references, etc. to expedite the qualifying/processing time. The program interacts with district administrative at the time of hire.

Post Construction Survey – Survey respondents rating the overall quality of the facility as above satisfactory or excellent six months after the Certificate of Occupancy is received.

Pre-Apprentice Program – The Florida Department of Education authorized the Monroe County School District to offer the "Steps" Pre-Apprenticeship program in the district's three high schools. This state approved training program is designed to give students Career Education opportunities while still in school. Enrolled students leave school for three periods per day and are partnered with an area business. Students earn high school credit and are paid a competitive hourly wage. The goal of the program is to provide students with career opportunities in Monroe County upon graduation.

SAT® (Scholastic Aptitude Test) – The SAT® is a three-hour-and-forty-five-minute test that measures the critical thinking, mathematical reasoning, and writing skills that students need to do college-level work. Each SAT section is scored on a scale of 200-800. The average score on the SAT is about 500 on the critical reading portion, 500 on the math portion, and 500 on the writing portion. Some of the questions are easy, and some are hard, but the majority are of medium difficulty. Medium-difficulty questions are answered correctly by about one-third to two-thirds of students. The SAT is designed so that a student who answers about half the questions correctly will receive an average score.

SMART Objectives – SMART objectives are those that meet the following criteria:

Specific: Performance is defined by accurately identifying who, what, when, where, when, and in what context.

Measurable: Data that is based upon results or results of behavior.

Attainable: Realistic to accomplish by average employees.

Relevant: Aligned with the organization mission, vision and objectives.

Timely: Start and end dates

SESIR-School Environmental Safety Incident Reporting – A system developed to help school districts correctly code data used to report incidents that are against the law or represent serious breaches of the district Code of Student Conduct.

Student Grade Access – Percentage of parents accessing is determined by dividing the total usage by the May student enrollment.

Student Meal Participation – Average daily attendance divided by the student meals served

Teacher Vacancies on First Day of School – The number of advertised instructional positions posted/unfilled on PATS as of the first day students report for the beginning of the school year.

Technology Literacy – Indicators with an interactive and performance based Student Tool for Technology Literacy (ST2L) assessed with 8th grade students.

Video Conferencing Savings – Includes mileage costs; travel labor costs; and meals and lodging if applicable.