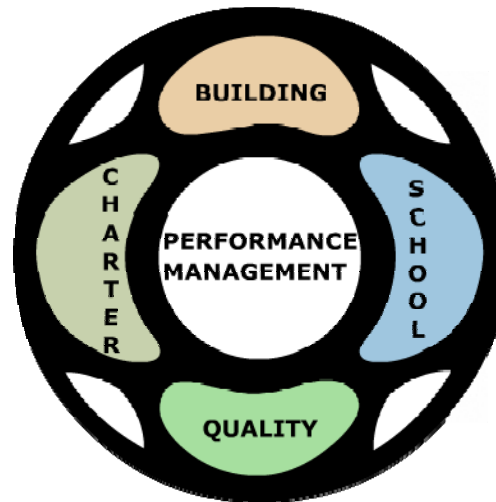




Building Charter School Quality:

Performance Management Institute 101



April 2009





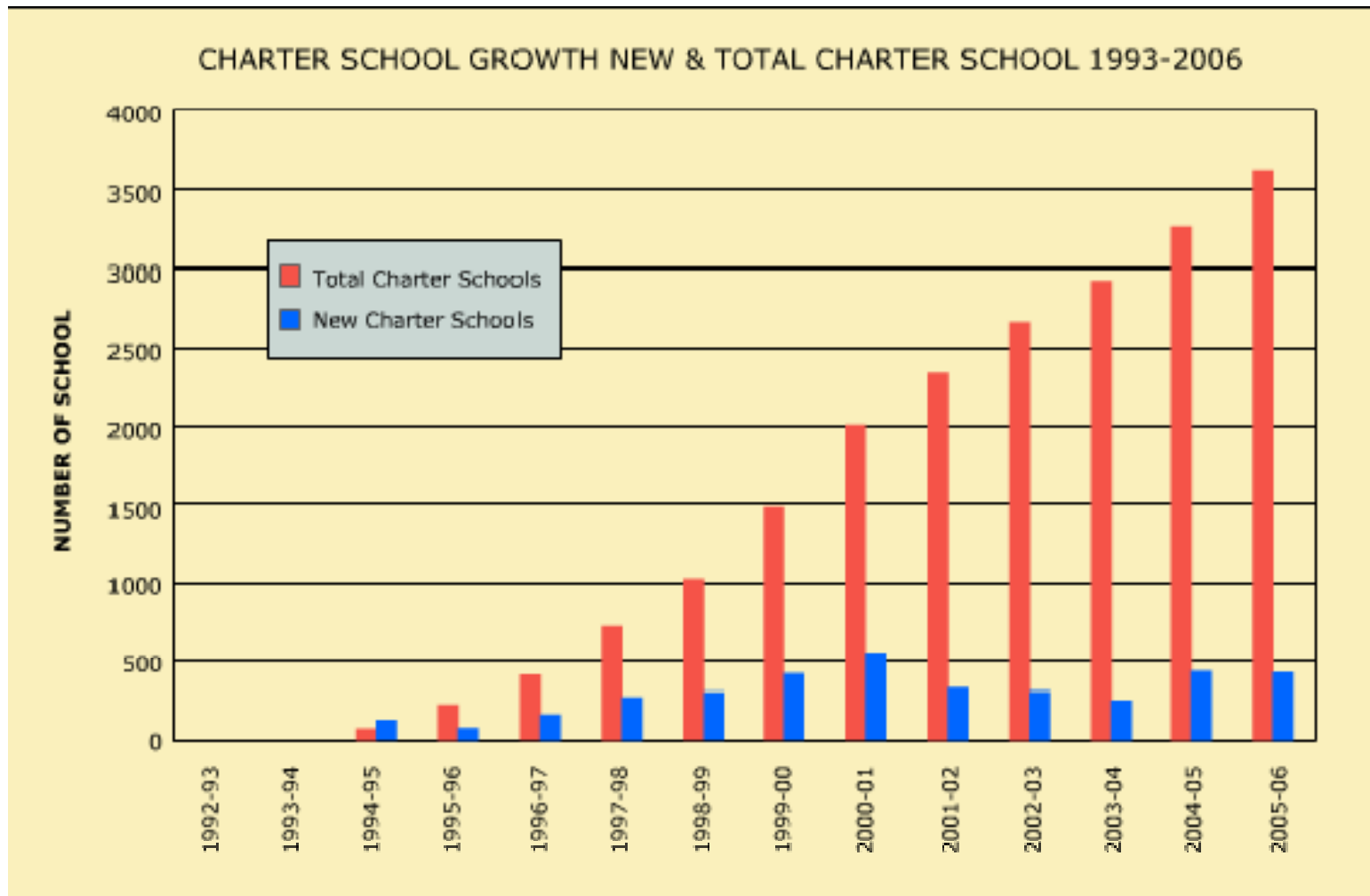
Agenda

- Introduce the Building Charter School Quality (BCSQ) Initiative
- Share recommended academic and operational quality metrics from BCSQ
- Explain how to manage performance towards the strategic plan
- Share a tool to assist with continuously monitoring performance





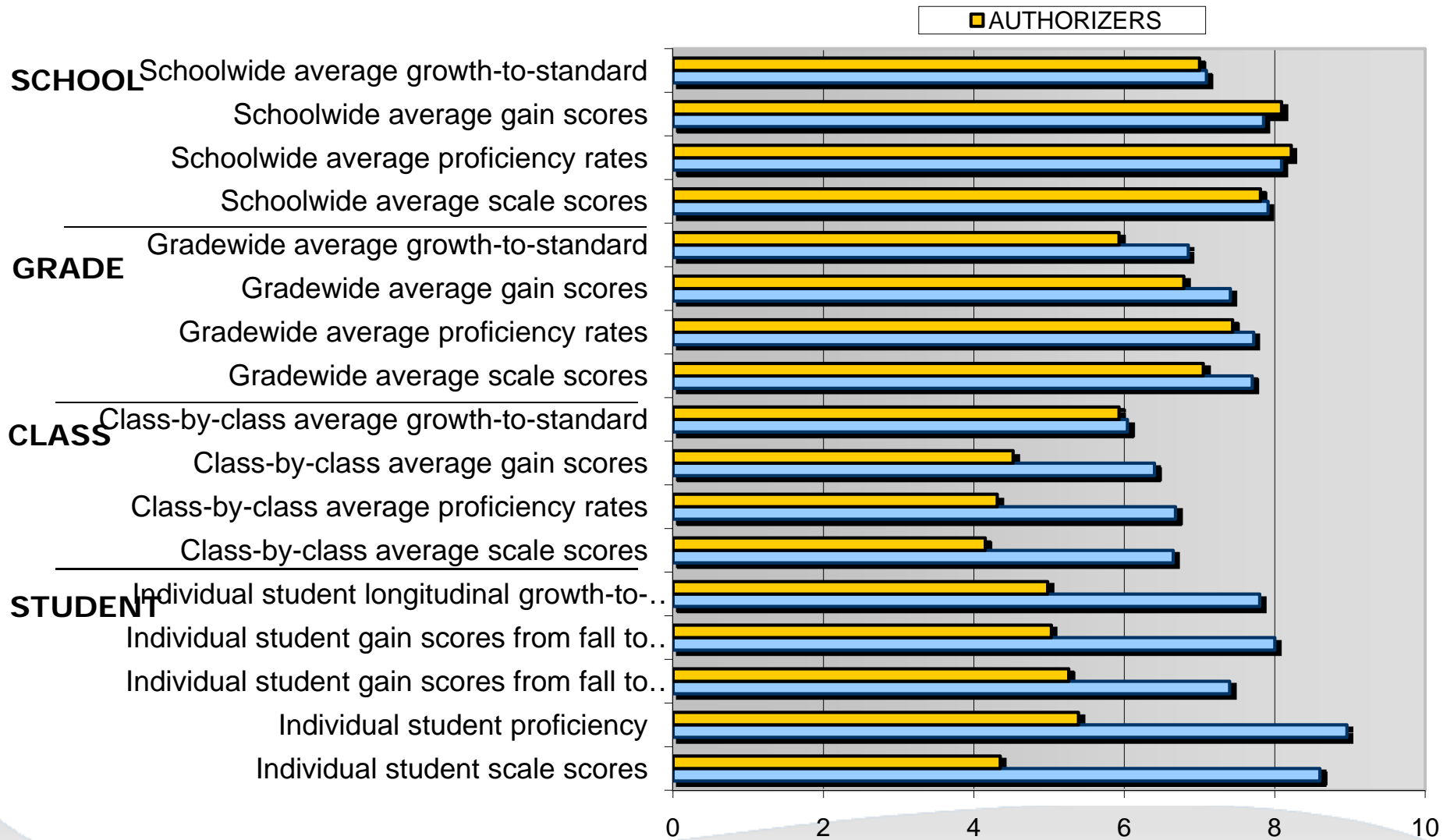
Building Charter School Quality Initiative: Charter Growth





Building Charter School Quality Initiative: Survey Results

Weighted Average of Importance for each Performance Measure





Building Charter School Quality Initiative: Partnership



Building Charter School Quality: Strengthening Performance Management among Schools, Authorizers, State Charter Support Organizations, and Funders (BCSQ), a three-year National Leadership Activities Project funded by the U.S. Department of Education's Charter Schools Program.





Building Charter School Quality Initiative: Goals & Benefits

BCSQ Goals

The CS community can dramatically improve its ability to:

- Measure CS performance and
- Use the measures effectively to manage on going operations and guide improvements efforts.



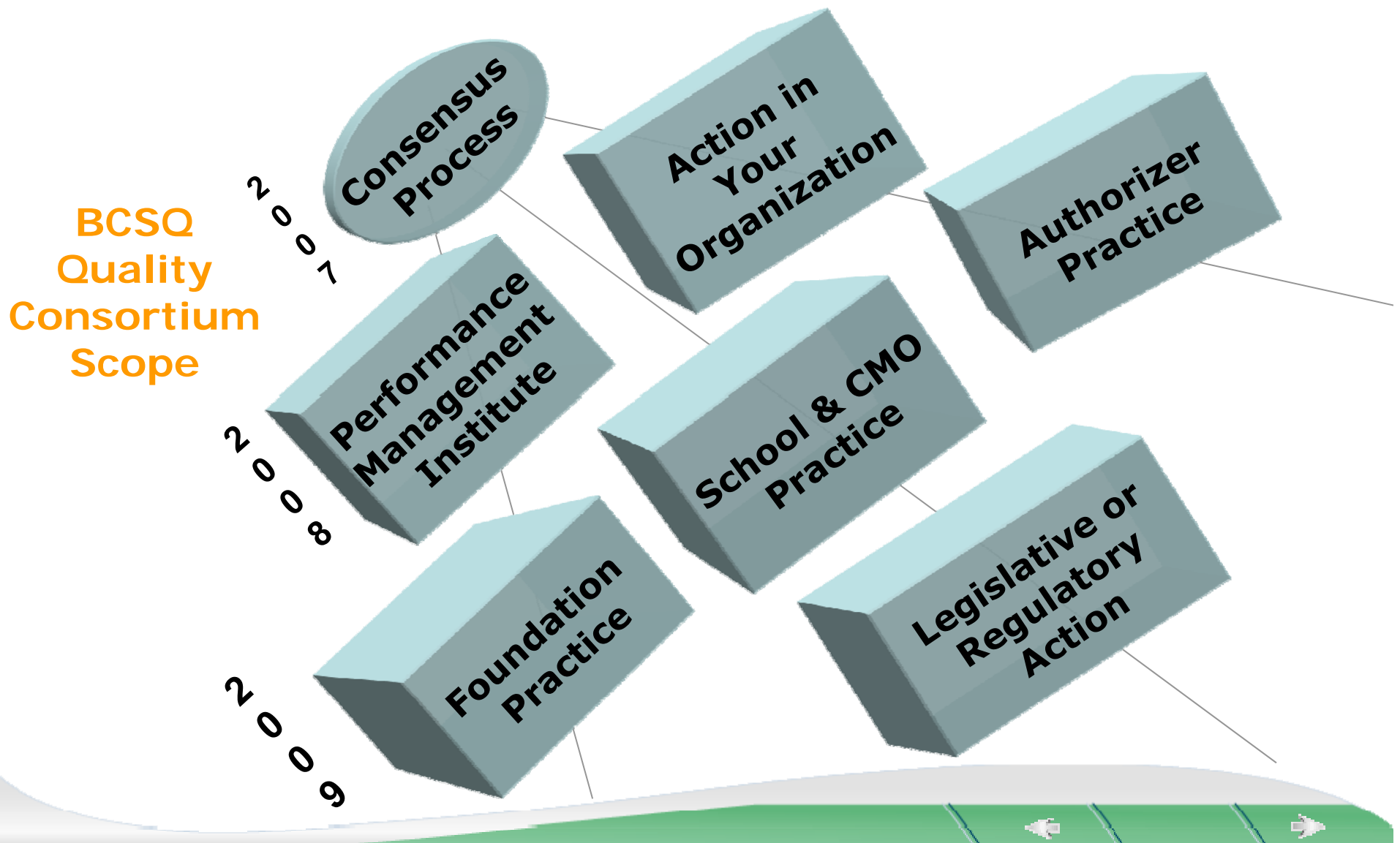
Expected Results/Benefits

The result will create stronger incentives across the sector for:

- High student achievement
- Sound management and sustainability
- Internal/external accountability



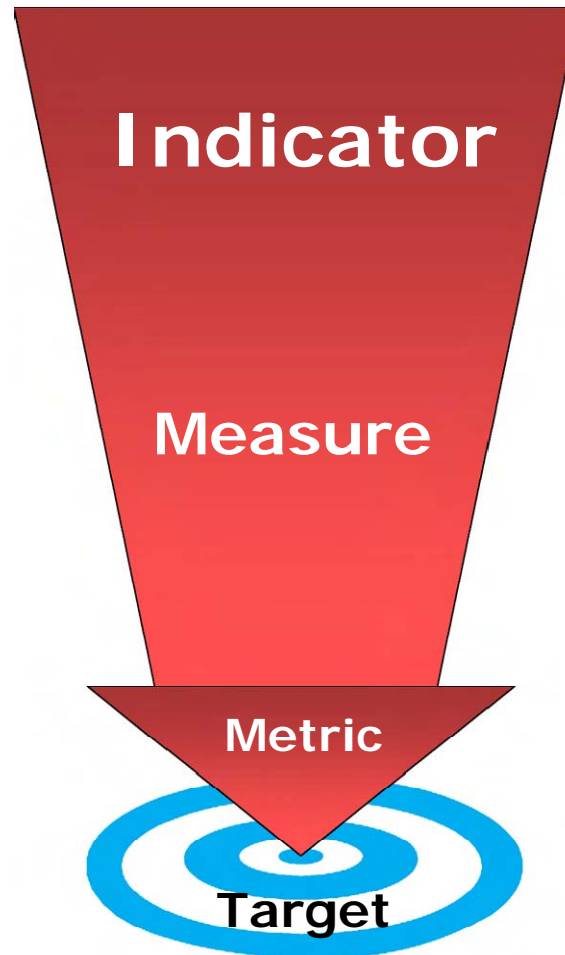
Building Charter School Quality Initiative: Timeline





C Q I

Key Elements of a Common Framework for Quality





Benchmark Comparisons for Metrics and Targets

BCSQ has defined two for Academic Achievement

1. The best-performing nonselective public schools in the district, state, and nation – defined as those demonstrating the **highest sustained achievement** and/or the **highest sustained student growth**, without regard to student race or socioeconomic status
2. The best-performing comparable schools with **equivalent individual student academic histories**, without regard to race or socioeconomic status in the district, state, and nation – defined as those demonstrating the highest sustained achievement and/or the highest sustained student growth among schools.



The background of the slide features a light blue and white color scheme. It includes a stylized globe, a line graph with an upward-pointing arrow, and various data visualization elements like bar charts and pie charts, all rendered in a semi-transparent, artistic style.

Performance Metrics from the BCSQ Consensus Process






The Framework for Academic Quality






Student Achievement Level or Status

Measure	Metrics	Benchmark Comparisons	
Proficiency Levels on State Assessments by Grade and Subject	Percentage of students scoring at proficiency Percentage of students scoring at each state performance level (e.g., Advanced, Proficient, Below Proficient) Adequate Yearly Progress (AYP) Attainment of Adequate Yearly Progress (AYP)	Best-performing nonselective public schools in the district, state, and nation Best-performing comparable schools in the district, state, and nation	






Student Achievement Level or Status

Measure	Metrics	Benchmark Comparisons	
College Entrance Exam Composite and Subtest measure	Percentage of students reaching score predictive of college success Median score Percentage of students taking college entrance exam	Best-performing nonselective public schools in the district, state, and nation Best-performing comparable schools in the district, state, and nation	






Student Achievement Level or Status

Measure	Metrics	Benchmark Comparisons	
High School Exit Exam (if applicable)	Percentage of students passing, by disaggregated groups	Best-performing nonselective public schools in the district, state, and nation Best-performing comparable schools in the district, state, and nation	






Student Progress Over Time

Measure	Metrics	Benchmark Comparisons	
Annual Gains for Same (Matched) Students	Percentage of students achieving or exceeding desired gains (e.g., one year's growth in one year's time)	Best-performing nonselective public schools in the district, state, and nation Best-performing comparable schools in the district, state, and nation	






Student Progress Over Time

Measure	Metrics	Benchmark Comparisons	
Longitudinal Growth Based on Similar Starting Points	Median growth rate Percentage of students achieving or exceeding typical or average growth rate Percent of students making or exceeding target growth rate	Best-performing nonselective public schools in the district, state, and nation Best-performing comparable schools in the district, state, and nation	






Student Progress Over Time

Measure	Metrics	Benchmark Comparisons	
Criterion-Referenced Longitudinal Growth	<p>Percentage of students making adequate growth to reach or maintain proficiency during a certain period of time</p> <p>Percentage of students already proficient or advanced who maintain or improve their performance level</p> <p>Percentage of students moving to a higher performance level</p>	<p>Best-performing nonselective public schools in the district, state, and nation</p> <p>Best-performing comparable schools in the district, state, and nation</p>	




Post-Secondary Readiness/Success

Measure	Metrics	Benchmark Comparisons	
Postsecondary Access & Opportunity	<p>Percentage of students enrolled in a college-prep curriculum (based on state high school standards or admission standards for in-state public 4-year colleges)</p> <p>Percentage of graduates submitting applications to postsecondary institutions, by type of program (colleges, trade and apprentice programs)</p>	<p>Best-performing nonselective public schools in the district, state, and nation</p> <p>Best-performing comparable schools in the district, state, and nation</p>	






Post-Secondary Readiness/Success

Measure	Metrics	Benchmark Comparisons	
High School Graduation Rate	<p>National Governors Association graduation rate formula</p> <p>The NGA graduation rate formula divides the number of graduates in a particular year by the number of students entering the ninth grade for the first time four years before, plus the difference between the number of students who transfer in and out over the same four years. That is: [On-time graduates in Year X] / [(first-time entering ninth-graders in Year X – 4) + (transfers in – transfers out over the 4-year period)]. Graduation Counts: A Compact on State High School Graduation Data, National Governors Association, 2005.</p>	<p>Best-performing nonselective public schools in the district, state, and nation</p> <p>Best-performing comparable schools in the district, state, and nation</p>	




Post-Secondary Readiness/Success

Measure	Metrics	Benchmark Comparisons	
Postsecondary Admission Rate	<p>Percentage of students gaining admission to postsecondary institutions (includes 4-year, 2-year colleges, trade and apprentice programs awarding licenses and certificate programs)</p> <p>Percentage of students submitting a complete Federal Application for Financial Student Aid (FAFSA)</p> <p>Percentage of Free/ Reduced-Price Lunch students admitted to college</p>	<p>Best-performing nonselective public schools in the district, state, and nation</p> <p>Best-performing comparable schools in the district, state, and nation</p>	




Post-Secondary Readiness/Success

Measure	Metrics	Benchmark Comparisons	
Postsecondary Enrollment or Employment	<p>Percentage of graduates, by cohort, enrolled in postsecondary institutions (college, trade and apprentice programs)</p> <p>Percentage of students, by cohort, not enrolled in postsecondary institutions but employed full-time or enlisted in the military by February of Year 1 after graduating from high school</p> <p>Percentage of students, by cohort, enrolled in remedial courses during their first year of postsecondary education</p>	<p>Best-performing nonselective public schools in the district, state, and nation</p> <p>Best-performing comparable schools in the district, state, and nation</p>	






Student Engagement

Measure	Metrics	Benchmark Comparisons	
Student Attendance Rate	Average Daily Attendance Percentage of students attending target percentage of days	Best-performing nonselective public schools in the district, state, and nation Best-performing comparable schools in the district, state, and nation	






Student Engagement

Measure	Metrics	Benchmark Comparisons	
Continuous Enrollment Rate	<p>Percentage of students continuously enrolled throughout the year</p> <p>Percentage of students re-enrolled from one year to the next</p> <p>Percentage of students continuously enrolled for multiple years</p>	<p>Best-performing nonselective public schools in the district, state, and nation (Highest sustained achievement and growth)</p> <p>Best-performing comparable schools in the district, state, and nation</p>	





Student Engagement

Measure	Metrics	Benchmark Comparisons	
Truancy Rate	Percentage of students with fewer than X truanancies in a given period of time	Best-performing nonselective public schools in the district, state, and nation Best-performing comparable schools in the district, state, and nation	






The Framework for Operational Quality






Financial Performance and Sustainability

Measure	Metrics	Benchmark Comparisons	
Student Enrollment Ratio	Actual Student Enrollment, per statutorily reported count(s)/ Budgeted Student Enrollment		






Financial Performance and Sustainability

Measure	Metrics	Benchmark Comparisons	
Liquidity	$\frac{\text{Current Assets} - \text{Current Liabilities}}{\text{Total Expenses}}$		






Financial Performance and Sustainability

Measure	Metrics	Benchmark Comparisons	
Sustainability	Total Unrestricted Net Assets / Average Monthly Expenses		






Financial Performance and Sustainability

Measure	Metrics	Benchmark Comparisons	
Occupancy Expense	Total Occupancy Costs (Lease or Mortgage) / Total Revenues		






Financial Performance and Sustainability

Measure	Metrics	Benchmark Comparisons	
Annual Audit	Absence of material or repeated audit findings in annual audit by qualified independent auditor		






Board Performance and Stewardship

Measure	Metrics	Benchmark Comparisons	
Board Member Skills, Knowledge and Commitment	<p>Collective years of board member experience in each of the following critical areas, at a minimum: Finance, Legal, Education, and Board Leadership/Governance</p> <p>Percentage of board members who attend more than 80% of board meetings</p>		






Board Performance and Stewardship

Measure	Metrics	Benchmark Comparisons	
Setting Expectations	<p>Percentage of short and long-term board approved academic and operating performance goals (for external accountability) that are SMART (Specific, Measurable, Achievable, Realistic, Time-bound)</p> <p>Short and long-term, board approved, SMART performance goals including at least one of the following areas: student achievement, student academic growth over time, financial health, operational efficiency, and organizational development</p>		




Board Performance and Stewardship

Measure	Metrics	Benchmark Comparisons	
Ethical Conduct	Absence of violations of authorizer-approved board policy governing ethical matters including conflicts of interest.		






Board Performance and Stewardship

Measure	Metrics	Benchmark Comparisons	
Regulatory and Reporting Compliance	Percentage of all required filings that are complete, accurate and on time Absence of violations of any regulatory or reporting requirements		






Board Performance and Stewardship

Measure	Metrics	Benchmark Comparisons	
Leadership Oversight and Evaluation	<p>Clear lines of authority, responsibility, and reporting</p> <p>Board monitoring of school/CMO leadership performance, as appropriate throughout the year</p> <p>Annual evaluation of school/CMO leadership performance against established performance expectations (SMART goals)</p>		






Board Performance and Stewardship

Measure	Metrics	Benchmark Comparisons	
Contract Management and Oversight	<p>Fulfillment of terms of charter contract</p> <p>Effective management and oversight of all service contracts, including any contracts for education/management services as evidence by, at a minimum:</p> <ul style="list-style-type: none">A. Clear, sound contracts that articulate roles and responsibilities; academic and operational (as applicable) performance goals, measures, timelines and terms; and consequences for inadequate performance, andB. Oversight that focuses on contractually-agreed performance outcomes and quality of service		




Board Performance and Stewardship

Measure	Metrics	Benchmark Comparisons	
Public Accountability and Transparency	Clear, accurate, regular communication by the school on its academic and operating performance to key constituencies and the public through a variety of means that maximize access and understanding		






Board Performance and Stewardship

Measure	Metrics	Benchmark Comparisons	
Securing the Future / Continuous Improvement	<p>Documented board and leadership attention to significant changes in the school's environment including authorizing changes and legislative, regulatory and policy activity</p> <p>Formal annual board review of performance and improvement against annual targets and long-term academic and operating goals</p> <p>Measureable improvement in the school's academic and operating performance over time, aligned with the school's performance contract goals</p>		




Parent and Community Engagement

Measure	Metrics	Benchmark Comparisons	
Satisfied Parents and Students	<p>Percentage of students and parents who give the school a high (A or B) rating on satisfaction surveys , with response rates of at least 75% from parents and at least 80% from currently enrolled students , broadly representative of the student population.</p> <p>Re-enrollment ratio – School’s rate of student reenrollment from year to year, compared to the district average and/or the school’s prior year re-enrollment</p>		



Parent and Community Engagement

Measure	Metrics	Benchmark Comparisons	
Excess Student and Parent Demand	$\frac{\text{Current Enrollment} + \text{Valid Excess Demand}}{\text{School's Current Enrollment Capacity}}$		





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How Do You Build Performance Management Within an Organization?



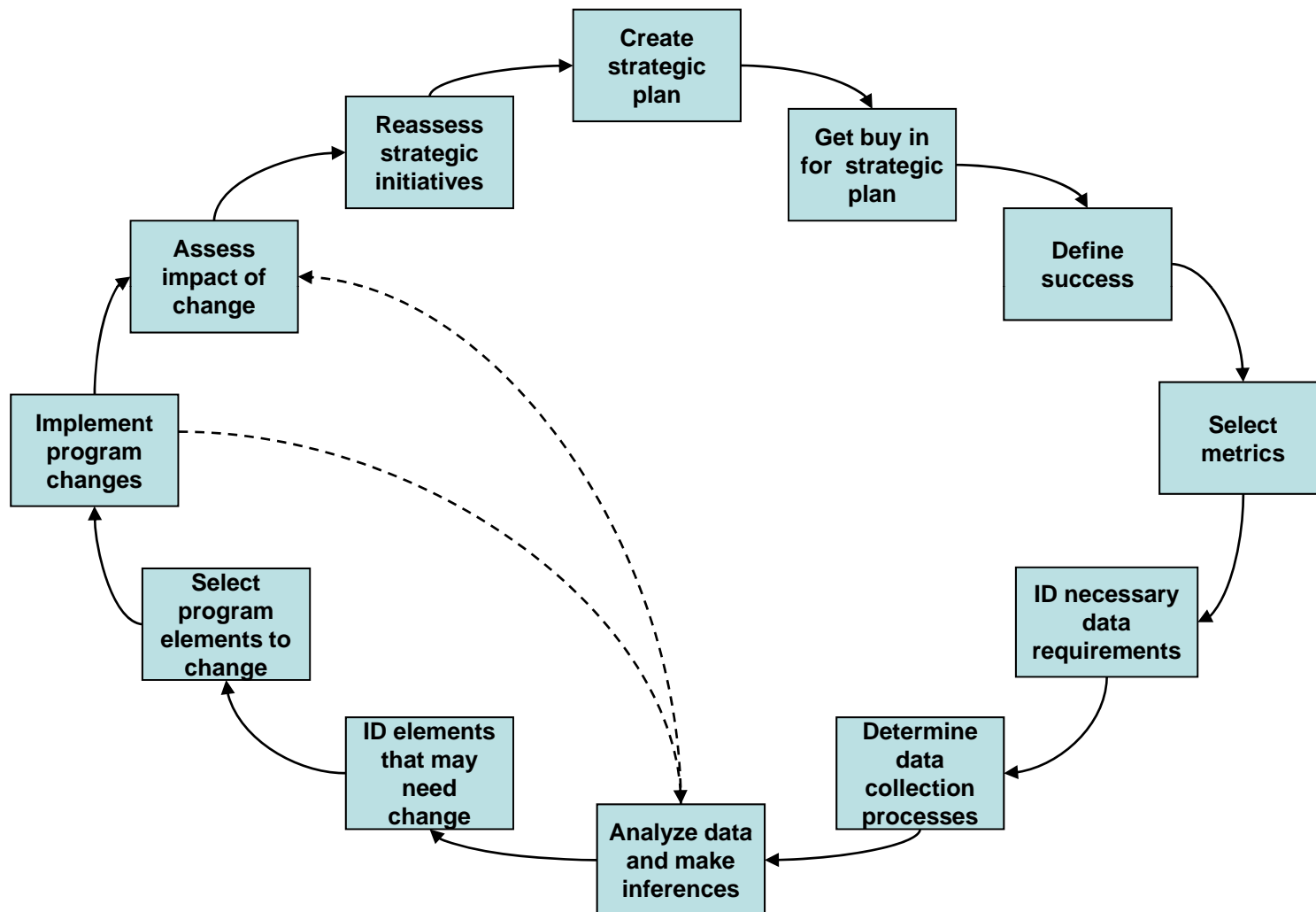


Managing Performance of the Execution of the Strategic Plan

- Performance Management (PM) is the framework for managing the execution of an organization's strategy.
- PM integrates:
 - Intention
 - Systems
 - Practice
- The strategic plan serves as a blueprint for a school's performance. However, schools need to continuously monitor their performance to ensure that they are staying faithful to the strategic plan and they are achieving the desired outcomes of the plan. They can do this by also implementing a Performance Management system.



The Performance Management Process





Analysis of the Performance Management Process

Symptom: A sign or indication that there is a problem at a particular process step.

Problem: The underlying situation, matter, or person that presents difficulty, signaled by a symptom.

Solution: The process or steps used to overcome the problem affecting a particular step in the process.

In-house Partner: The person or people in your organization necessary to implement the solution to the problem.

Concerns: Items that may cause difficulty implementing a solution to the problem in your organization.



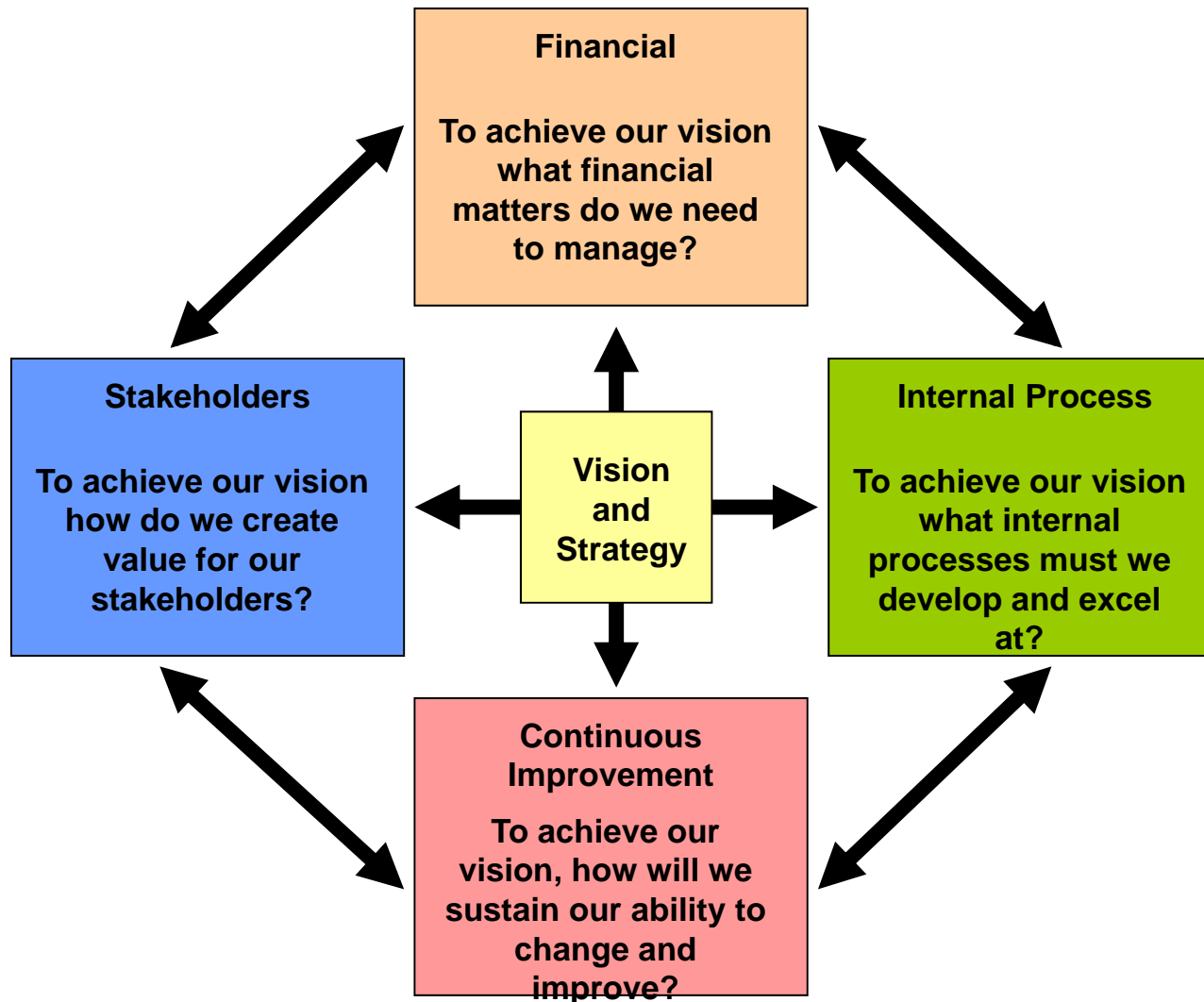
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How Do You Monitor Performance?





Balanced Scorecard for Charter Schools





Balanced Scorecard for Charter Schools - Example

	Indicator/Goal	Measure	Metric	Target	Timeframe	Responsible
Financial	•Financial liquidity	•Cash	•Days cash on hand	•90 days cash on hand	•Monthly	•Business manager
Internal Process	•Data security	•Working files	•Percent of files backed up	•100% of files backed up	•Weekly	•IT Director
Continuous Improvement	•Teacher certification	•Professional development	•Percent of teachers with 10 hours of professional development	•100% of teachers have 10 hours of professional development	•Quarterly	•Vice Principal
Stakeholders	•Reading Growth on FCAT	•Proficiency level	•Percent moving to the next proficiency level	•25% move to next proficiency level	•Annually (when FCAT scores published)	•Principal



BCSQ



Building Charter School Quality

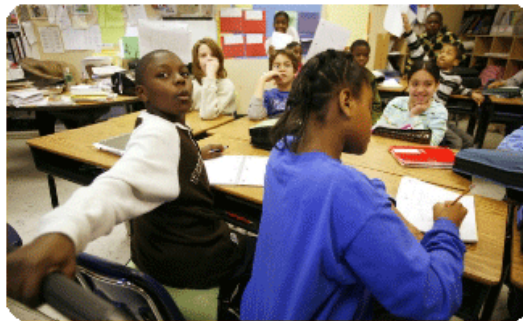
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Building Charter School Quality is a project funded by the United States Department of Education Office of Innovation and Improvement. This National Activity project aims to improve student achievement by helping charter school operators and authorizers strengthen their performance management practices. The National Alliance for Public Charter Schools, the National Association of Charter School Authorizers, the Colorado League of Charter Schools and CREDO, an education and policy research group at Stanford University are partners in the project. This site provides access to on-going updates of the BCSQ project as well as consensus documents, continuing discussion groups and position papers.

The three-year project has several program components:

The Quality Consortium will assemble charter school leaders from across the country for a national forum to review and endorse quality standards and measures for use by charter school authorizers, school operators and other involved parties such as legislators and funders.

The BCSQ Consensus Process is a deliberative standards setting body that works to establish performance measures for charter school effectiveness.

The Performance Management Institute provides classroom and web-based training to enhance the ability of charter school operators and authorizers, as well as others, to adopt and apply performance measurement practices to charter schooling and its oversight.

Please let us know what you think of the site – we welcome suggestions to improve it!

WEBSITE

www.bcsq.org

