

## Strategic Planning in K-12 Schools A Balanced Scorecard Perspective

Presented at MASA/MASE Spring Conference  
February 18, 2010

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### What is Strategic Planning?

- Management tool to facilitate organizational success
- Formal process
- Long-term plan (3-5 years)
- Begins with an assessment of current status
- Built upon the organization's mission & vision
- Identifies the organization's goals
- Identifies strategies to achieve the goals
- Strategies have measureable targets
- Working document

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### What is the Balanced Scorecard (BSC)?

- Strategic planning tool designed in 1990 for performance management in businesses
- Robert Kaplan, Harvard accounting professor
- David Norton, business consultant
- Four organizational perspectives
  - Customer
  - Financial
  - Internal Processes
  - Learning and Growth

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**Balanced Scorecard in K-12 Education**

- For strategy-focused school districts
- Roadmap for driving system-wide performance measurements
- 2 basic principles
  - If you can't measure it, you can't manage and improve it
  - Measurement motivates

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**Balanced Scorecard**

Perspectives	Goals	Strategies	Measures	Targets
Customer				
Financial				
Internal Processes				
Learning & Growth				

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**Students (Customer)**

Concerned with the satisfaction and success of current and future students, that the educational needs of students/parents are met, that through effective customer service and satisfaction, we maximize opportunities for as many students as possible, both residents of our district and potential open-enrolled students from other districts

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**Financial**

Concerned with providing education that is cost-effective, that budgets are balanced, that unreserved fund balances are maintained at an acceptable level, that risk is reduced, and that district assets are utilized appropriately

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**Internal Processes**

Concerned with the internal processes of the district and achieving quality performance standards such as Adequate Yearly Progress (AYP/statewide testing), development and demonstration of 21<sup>st</sup> century skills by students (collaboration, cooperation, agility and adaptability, effective oral and written communication, ability to access and analyze information, initiative and entrepreneurialism, creative problem solving), assuring buildings and other assets are safe and functional, and the development of a positive school culture.

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**Learning and Growth**

Concerned with employee skills and professional development, maximizing technology opportunities, and effective strategies to keep students and staff motivated.

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<b>Northland Community Schools Strategic Planning Process</b>	
Oct/Nov:	Core Team development Revision of Mission and Vision
December:	Development of goals for each perspective Brainstorming potential strategies
January:	Community & staff meetings to explain the strategic planning process to brainstorm potential strategies to achieve
Jan/Feb:	Subcommittee meetings to collect data and analyze strategies
March:	Make recommendations to the School Board
Mar/Apr:	Complete Scorecard to be initiated in 2010-2011

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<b>Strategic Planning Core Team</b>
<ul style="list-style-type: none"> <li>▪ Subcommittee of the School Board           <ul style="list-style-type: none"> <li>▪ Working committee</li> <li>▪ Responsibilities               <ul style="list-style-type: none"> <li>▪ Developed the mission and vision statements</li> <li>▪ Developed the district goals</li> <li>▪ Identified and worked with staff, student, and community committees who identified potential strategies to achieve the goals-Carouseling Activity                   <ul style="list-style-type: none"> <li>• Collected and analyzed data</li> <li>• Made recommendations based upon the analysis</li> <li>• Identified strategies, measures and targets to achieve the district goals</li> </ul> </li> </ul> </li> </ul> </li> </ul>

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<b>Strategic Planning Core Team</b>
<ul style="list-style-type: none"> <li>▪ Made Recommendations-no authority</li> <li>▪ Recommendations were considered by the School Board</li> <li>▪ School Board has the authority to approve the recommendations</li> <li>▪ Administration and staff are responsible to implement the strategic plan once approved by the School Board</li> <li>▪ Administration and staff are responsible to report progress on goals</li> </ul>

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**Core Team**

7 School Board Members  
2 District Principals  
1 Teacher Representative  
1 Associate Staff Representative  
5 Community Representatives  
2 Facilitators

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**NCS Mission Statement**

The mission of Northland Community Schools  
is to provide education that promotes  
motivation and innovation for every learner in  
an ever changing world.

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**NCS Vision Statement**

Through unified family, community, and school  
relationships and rigorous curriculum,  
Northland Community Schools will ensure  
that each student acquires 21<sup>st</sup> century skills to  
achieve his or her potential, become a  
productive community member, and value  
life-long learning.

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**Customer Goal**

Northland Community Schools will ensure that each student achieves his or her potential, becomes a productive community member, and values life-long learning.

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**Financial Goal**

Northland Community Schools will be fiscally responsible as demonstrated by operating within balanced budgets and returning the unreserved fund balance to a level that provides for 3 months of operating funds.

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**Internal Processes Goal**

Northland Community Schools will provide a welcoming school culture in a high-quality learning environment where students achieve performance standards and develop 21<sup>st</sup> century skills.

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## Learning and Growth Goal

Northland Community Schools will provide a motivating learning environment where highly-effective staff provide education and support services through best-practices strategies, diverse curriculum, and innovative use of technology.

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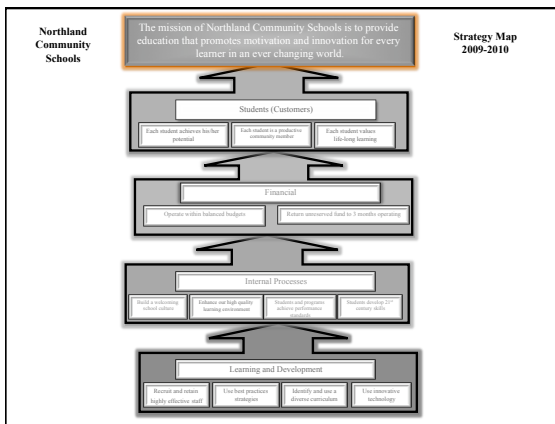
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## NCS Financial Scorecard

Goals	Strategies	Measures	Targets	Review
Operate within a balanced budget	1) Change to a 4 day school week 3) Operate on 1 campus 4) Operate within the approved annual budgets	1) Operating expenses identified in these line items 2) Operating expenses identified in these line items 3) Operating expenses identified in all line items	1) Decrease of \$133,000 during 10/11 2) Decrease of \$322,310 (10/11) and \$454,875 (11/12) 3) Operate within 4% margin in the overall approved annual budget	1) 10/10, 12/10, 3/11, 6/11 2) 1/11, 6/11, 1/12, 6/12 3) monthly
Return the unreserved fund balance to 3 months operating	1) Pass an operating levy 2) Operate within the approved annual budgets	1) Operating levy passes 2) Unreserved fund balance	1) Increase the current operating levy by \$1,000 per student 2) \$250,000 annual increase beginning 11/12	1) 11/10 2) Annually at the end of each fiscal year

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### Strategy Principles

- Facilitate change through executive leadership
  - Change is YOUR responsibility
  - Should be based on where YOU want to drive your school
  - Must develop internal and external trust-transparency
- Translate the strategy into operational terms
  - Everyone must understand and act on the strategies
  - Provides a wealth of data that can be used to obtain funding

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### Strategy Principles

- Align the organization/school to the strategy
  - BSC is initiated at the top level
  - Strategies cascade to the operating units
  - Common language that develops district alignment
- Easy to understand reporting mechanism
  - Annual or more frequent reports to the Board & community
  - Visual-color code green/yellow/red (met/progress/not met)
- Make strategy a continual process
  - Strategies happen/reviewed/revised continuously
  - Shows that resources will be deployed and shows benefits

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### K-12 Schools using Balanced Scorecard

- Atlanta Public Schools, GA
  - [Atlanta Public Schools-BSC hyperlink](#)
- Bismarck Public Schools, ND
  - [Bismarck Public Schools BSC hyperlink](#)
- Charlotte-Mecklenburg Schools, NC
  - [Charlotte-Mecklenburg Schools-BSC hyperlink](#)
- Minot Public Schools, ND
  - [Minot Public Schools-BSC hyperlink](#)

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