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Board Level Academic Dashboards

Step 1: Set goals and metrics for measuring progress

Overview

Board members like the idea of having a dashboard so they can track academic progress—so much so that they often go straight for their computer spreadsheets and start drafting charts and graphs for how they want to see the data.

But there is one key step that must happen before you can get to the visuals—goal setting.

Charter school leadership needs long-term and annual school goals that are tied to a strategic plan and set the standard for what the school will achieve each year. Many school leaders and board members find goal

> A dashboard *tracks* goal progress but does not *create* goals. If you have not identified your annual academic goals, STOP HERE.
> You need to engage in a thoughtful goal-setting ~~process before creating~~

setting to be a lengthy, difficult process and—when done well—it is. It requires focused conversation about the following: the vision for the school, the definition of success, and the strategies for achieving those outcomes. For more about overall goal setting, see the Education Board Partners tool on Annual Goal Setting. This tool details methods for setting and approving goals at the board level.

Setting Annual Academic Goals for the Charter School

Annual academic goals define academic success for the charter school over the course of the year. The school leader implements a plan for the year that strives to achieve these

results. Annual academic goals are built through collaboration between the school leadership, the school performance committee, and the full board per the matrix below. (Note: If you do not have a school performance committee, see CBP's tool, School Performance Committee Charge.)

Roles in Building and Approving Annual Academic Goals

Task	School Leader	School Performance Committee	Full Board
Set long-term and annual academic goals	Leads the process and presents draft to school performance committee for discussion	Reviews, asks questions, discusses metrics, and collaborates to determine whether the metrics will provide the board with the data it needs to inform its decisions; then provides recommendations of academic goals for full board approval	Discusses and approves academic goals, in the context of overall strategy
Monitor academic results against set goals	Leads school staff in populating dashboard, highlights progress, interprets results	Reviews progress, provides feedback on presentation of data, prepares regular updates for the board (at least	Reviews data summary: Are the students on track to achieve annual goals and is the school leader leading toward sufficient

		two per year)	results?

Strong Goals

Effective goals are critical to creating a useable dashboard. Academic goals go well beyond annual standardized tests, as charter schools aim to do much more than improve scores on one annual test. Instead, the board should discuss academic goals more broadly. Consider whether your school would benefit from academic goals in multiple categories such as:

Mission-specific: What is your school's specific focus? For example, if your charter school is a Chinese bilingual school, the board should see metrics that measure progress toward language proficiency.

Accountability: What matters to your authorizers? What does the public value?

Priorities: What are your major concerns or key areas of academic focus based upon prior outcomes? For example, if one of your campuses is performing at a lower level than the others, you may want to set a specific goal around the lagging campus.

In addition to considering the right categories, make sure your goals are SMART goals:

Specific: What? Why? Who? Where? Which? (E.g., what subject matter are we tracking? Which students does the goal pertain to?)

Measurable: How will I know when it is accomplished? Start thinking about specific metrics you may use here. Would they be easy to display in a dashboard?

Achievable: Must balance current reality with the board's responsibility for ensuring the school leader is delivering sufficient academic results. It is best practice to consider recent scores, in light of the performance of other comparable schools, to get an idea of what a realistic goal might look like.

Relevant: Does this seem worthwhile? Match our efforts? Align with our mission?

Time Bound: When will this be accomplished?

It is infinitely easier to build an effective academic dashboard when the academic goals are SMART goals.

To provide examples of these goals, consider the following case study schools.

Case Study Schools

	Capital Science and Technology PCS	Parkview Bilingual PCS
Years of Operation	14	3
Campuses	2	1
Grade Levels Served	5 – 12	PK – 4
% Low Income	80%	50%
Curriculum emphasis	STEM focus	Language immersion
Past Performance	High school strong, middle school struggling in math	Performing very well in English Language Arts (ELA) and in math
Special Concerns	Low-income subgroup scores 15% below city average	Wants to find a way to report on mission-specific measures

Sample FY15 Annual Academic Goals

Capital Science and Technology PCS By July 1, 2015:	Parkview Bilingual PCS By July 1, 2015:
At least 75% of Capital Science and Technology PCS middle school students will be proficient in mathematics, as measured by the PARCC assessment. (Priority Goal)	Parkview Bilingual will rank in the top 10% of schools in the District of Columbia, as measured by the Public Charter School Board's Performance Management Framework. (Accountability goal)

At least 50% of 12th-grade students will be scoring at or above the national average of 500 on the reading and mathematics portions of the SAT assessment.	At least 85% of 3rd-grade students at Parkview Elementary will be reading on or above grade level, as measured by the Fountas & Pinnell literacy assessment. (Mission Goal)
56% of Capital Science and Technology PCS low-income students will be proficient in mathematics, as measured by the DC-CAS assessment (a 15% increase from the 2012 level of 41%). (Priority Goal)	From September of 2014 to June of 2015, 80% of all Parkview Elementary students in 1st through 4th grade will demonstrate at least one year of progress in reading level, as measured by the Developmental Reading Assessment.
Capital Science and Technology PCS students will meet the academic goals in the charter, enabling the school to submit a successful application for renewal from the authorizer. (Accountability Goal)	70% of 5th-grade students will score proficient or advanced on Parkview's assessment of Spanish Proficiency. (Mission Goal)

Note the differences in the goals. Different charter schools should have different academic goals depending on the mission, current performance, and assessment strategies. Some of the goals above are focused on achievement level, while others focus on growth. Some relate to standardized assessments, and others can be monitored internally. Some of the goals are purely internal while others seek to compare the school against external measures. While all of the sample goals include the most important aspects of SMART goals, some will be easier than others to measure on a dashboard —a topic that is discussed in the next section.

Creating Metrics That Monitor Annual Progress

Once boards and school leaders define the annual goals, they need to agree on metrics that will monitor progress toward these goals throughout the year.

Determining metrics for SMART goals in schools can prove challenging. It is important that

boards measure progress toward goals, but if the measure is an end-of-year assessment like the upcoming PARCC, it is hard for school leaders to report on progress along the way. Many charter schools and boards set a particular proficiency goal for their students. But how would the board know that the school leader is on track to meet that goal over the year if the students don't take the test until April and the school leader doesn't get the results until June? Many boards cross their fingers between September and May, hoping that the standardized test results meet their goals.

So how do boards monitor progress toward goals through the year? They monitor other "formative assessments" that will provide data that give insight into how well the students are doing throughout the year.

Identifying how to measure progress toward goals—i.e. what metrics you will track over time—will help strengthen the overall goal-setting to establish that the goals are, in fact, measurable. The school leadership and the School

Formative assessments monitor student learning in the midst of the learning process to provide ongoing feedback.
*Summative* assessments evaluate student learning at the end of a unit (or even a full year).

Performance Committee should determine and discuss the interim metrics of SMART goals. The school performance committee might want to ask school leaders:

- Do you have an assessment that you can use to track progress toward this goal over time?
- How many times per year will you be able to provide updates on progress toward this goal?
- Are these assessments aligned with curriculum and/or standards?
- Do these assessments produce valid results?

Once the school leader and school performance committee agree on the assessment(s), the school leader drafts the first metrics plan and asks the school performance committee for feedback.

Tips for Creating Strong Metrics

Pick metrics that dovetail with information that the school is already tracking. School leaders will be tracking the largest set of data—each student, class, and overall school. The school performance committee will dive into a subset of that same data, and then bring to the board an even smaller subset of that data. Think of it as funneling the data; the school leader examines the largest amount of data, and the volume and specificity of data narrows as it gets closer to the full board.
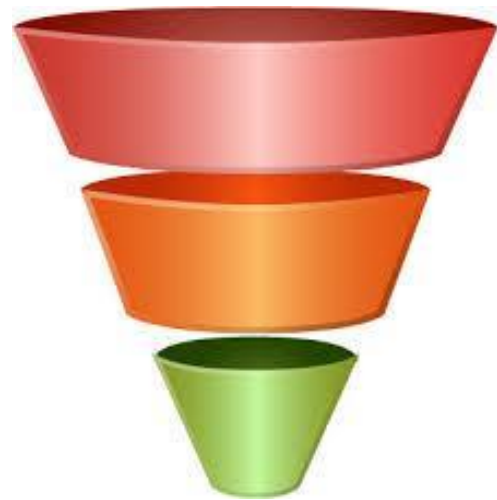
Make sure the school leader has the resources, time, and people to track the metrics the board wants to monitor. Too often boards ask for very specific data in a broad range of areas making data collection a drain on internal resources. For instance:

- Tracking some goals may require additional assessments and significant sacrifice of instructional time. School leadership may argue that tracking this goal is not practical.

- Compiling large amounts of data is labor intensive for school staff. Staff capacity will determine how many measures can be tracked and how frequently the results are reported. Board members must be sensitive to these concerns. If compiling the dashboard is prohibitive from a capacity or resource standpoint, the school leader and board must find a solution that recognizes reality and still effectively measures

progress toward goals.

Example: School ABC wants to incorporate science achievement data into its dashboard, but there is no current, valid, meaningful science assessment aligned with state standards. The school will need to choose a different goal or to identify, purchase, or create an appropriate assessment. The board should understand the resources required to collect data toward this goal and ask if this is, in fact, the right goal.

Don't insist upon dashboard metrics that are impossible for school staff to track consistently and accurately. A *theoretical* dashboard will not be helpful to the board, so it is best to set realistic expectations for what the staff can track and report in a timely manner.

Example: School ABC teachers enter assessment results into a database, and a data coordinator generates new reports every week. Their committee sees new data at every committee meeting. School XYZ is smaller and does not have a data coordinator. Teachers are accustomed to recording scores on paper or personal computers. The XYZ board struggles to make frequent dashboard updates.

A reporting calendar can help hone metrics and prepare board members. As school leaders and board members determine the metrics they will use to measure goals, they may want to consider creating a reporting calendar to ensure transparency in reporting schedules. A calendar can also help in considering whether the goals on the dashboard are goals that can be benchmarked throughout the school year. You might choose to include some goals in your dashboard because they are important for accountability, even if you are not able to benchmark progress throughout the year. On the other hand, you may decide to exclude a measure entirely and substitute a proxy measure.

Consider the chart below. School ABC cannot report its standardized test (PARCC reading) scores throughout the school year; scores are delivered once annually in July. While critical for external accountability, the school decided not to include the assessment in the dashboard since it could not be updated more frequently. Instead, ABC opted to include interim assessment measures, as they align with the state assessment. These interim scores serve as a proxy measure for the PARCC reading scores. Additionally, school ABC chose to include the end-of-course assessments as a dashboard measure, but notified board members that data would not be available until June.

School ABC Reading Assessment Chart

Assessment	Sept	Dec	Apr	Jun	July
PARCC Reading					X
Interim Assess.	X	X	X	X	
End-of-Course				X	

There are few right or wrong answers about which assessments can be included in the dashboard. Most importantly, clear communication about the dashboard is critical to ensure school staff and board members share the same expectations. Consider including key assessment dates on your board's Annual Calendar.

The Overlap Between Goal Setting and Metric Setting

Although setting the goals is the first step in the process, discussions about measures and school resources will overlap with goal setting because if you can't measure something effectively, it is not a useful goal. This part of the process will be iterative; you will need to find fair compromises between ideal and realistic goals. This work may feel difficult, complicated,

and perhaps filled with compromises you would rather not make.

Make sure you understand your assessments: what they measure, what they don't measure, and how they are used for things other than reporting. Many common assessments are formative, primarily used by teachers to provide ongoing feedback about student progress.

Regardless of the ultimate list of goals and metrics, it is the board's role to approve annual academic goals.