

**newschools**  
venture fund



## **PERFORMANCE DASHBOARDS**

### **Key Strategies From NewSchools' Portfolio Ventures**

June 2008

**TABLE OF CONTENTS**

**Methodology ..... 3**

**Discussion Questions ..... 4**

**Introduction ..... 5**

**Design and Use of Performance Dashboards..... 5**

**Key Strategies..... 7**

**Areas for Development .....14**

**Conclusion .....14**

**Appendices: Tools and Resources.....15**

## METHODOLOGY

This case study was prepared by NewSchools Venture Fund to document “promising practices” in use by our portfolio ventures in a format that could be shared with others in the portfolio. To complete this case study, NewSchools conducted background research on Aspire Public Schools, Leadership Public Schools, and Uncommon Schools, Inc. and interviewed management teams at each of these organizations. As a result, NewSchools compiled a variety of practices and approaches that nonprofit charter management organizations (CMOs) have put in place to implement performance dashboards across their schools.

### About the Organizations

Aspire Public Schools (Aspire) establishes and operates public charter schools in California focused on providing low-income, urban youth with a high-quality education that will prepare them for college. Founded in 1998 to “enrich students’ lives and to reshape the public school system,” Aspire opened its first two charter schools in 1999 in California’s Central Valley, and currently operates 21 schools in six counties throughout California that together serve nearly 6,000 students in grades K – 12.

Leadership Public Schools (LPS) is a charter management organization (CMO) founded in 2002 to serve a diverse population of California’s students by operating a network of outstanding charter high schools. LPS schools serve ethnically and economically diverse student bodies and are located in or near low-income neighborhoods. The organization currently runs five high schools and nearly 1,400 students.

Uncommon Schools, Inc. (Uncommon) is a CMO that starts and manages outstanding urban college preparatory charter schools working to close the achievement gap in the Northeast. Uncommon manages nine schools in New York City, upstate New York, and Newark, New Jersey; these schools serve 1,350 students in grades K-12 across four geographic regions. The organization also has two associate member schools in Boston, Massachusetts.

### About NewSchools Venture Fund

NewSchools Venture Fund is a national nonprofit venture philanthropy firm that seeks to transform public education – particularly for underserved students – by supporting education entrepreneurs and connecting their work to systems change. In order to maximize the impact of its ventures, NewSchools also connects the work of these entrepreneurs with one another and with the broader field through events and publications. By leveraging this collective knowledge, NewSchools’ ultimate goal is to empower these entrepreneurs to transform public education so that *all* children have the opportunity to attend a high-quality public school.

## DISCUSSION QUESTIONS

As you think about how the practices described here apply to your own organization, please consider these questions:

1. Has your organization engaged in conversations around what student, school, or organization-wide data you need to collect and measure over time?
2. Do you have a system in place for collecting these data? If so, what documents do you use to collect and analyze data? Is this system working for your organization?
3. Do you set goals on an interim basis for your organization's financial, academic, or operational performance? How are these goals tied to the metrics you collect?
4. How does the data you collect inform organizational decision making and the development of improvement plans over the course of the school year?
5. Do you share interim, quarterly, or monthly progress with your board of directors? How much or how little information do you present to them?

## INTRODUCTION

A **performance dashboard** is a dynamic management tool that is used by an organization to gauge performance and progress toward specific goals. The dashboard is updated several times throughout the year, and its metrics may span several dimensions of the organization, including operations, finance, and academics. It provides timely data to the organization's executives, managers, and employees, who use the performance dashboard to identify problems in real time and to manage people, decision making, and processes to optimize performance. Additionally, dashboards serve as a helpful tool in providing boards with consistent and up-to-date information on how the organization is progressing against its goals.

While performance dashboards may resemble other data tracking mechanisms, dashboards tend to be more consistent, more frequently compiled, and more thoroughly integrated into the organization's work, providing information on a predictable schedule and in a consistent format. Also, it is important to note that while dashboards are used to track data, they are meant to be used primarily as management tools, rather than for accountability purposes. To this end, performance dashboards can streamline information collection and sharing, and, in turn, streamline organizational planning. As Wayne Eckerson, author of *Performance Dashboards: Measuring, Monitoring, and Managing Your Business*, put it, a performance dashboard functions as an "organizational magnifying glass."<sup>1</sup> In other words, by tracking progress over time, the dashboard illuminates trends, cycles or outliers that can inform an organization of the key factors influencing (or inhibiting) its success.

It is important to note that performance dashboards are only as effective as the structures that are in place to keep them populated and integrated into broader organizational strategy and activities. Overly complex or isolated dashboards will not inform – and may only confuse – the overall performance of any organization. However, organizations that create clear systems for information collection and that promote a culture of using dashboards to drive decision making find that these tools have a significant positive impact on performance.

## DESIGN AND USE OF PERFORMANCE DASHBOARDS

This toolkit presents examples of three CMOs that use performance dashboards to better inform their work. Uncommon Schools, Inc. (Uncommon), Aspire Public Schools (Aspire), and Leadership Public Schools (LPS) each developed performance dashboards for distinct reasons. This tool includes (1) Uncommon's dashboard, which focuses on measuring student academic achievement, (2) a dashboard from Aspire that is strictly focused on tracking operational and financial performance, and (3) three separate dashboards created by LPS that are used to measure both academic achievement and operational metrics, and also to evaluate recruitment and track school-specific demographics. A more detailed look at the variety of metrics, design techniques and goals included in these dashboards is outlined in the table below. (See table below)

Each organization dedicated different resources to the design and use of these dashboards. At Uncommon, the managing director of one of Uncommon's five networks of schools, Paul Bambrick, led the development of the performance dashboard with additional support from a summer intern. To maintain the dashboard, data are filled in by Operations Directors at each school site. At Aspire, the performance dashboard was produced internally by the senior management team. The dashboard is populated by the assistant to the regional vice president. At LPS, the various dashboards were created by the departments at the home office that oversaw the particular areas being measured; these same departments remain responsible for populating the dashboards on a monthly or quarterly basis.

---

<sup>1</sup> Wayne Eckerson, *Performance Dashboards: Measuring, Monitoring, and Managing Your Business*, John Wiley and Sons, 2006.

## Types of dashboards used by CMOs in this study

Each of the CMOs we surveyed uses its own approach concerning when dashboards are compiled and the audiences with whom they are shared. Since performance dashboards need to be integrated into an organization's culture in order to be effective tools, each organization designed its dashboard internally. It is important to note that each dashboard has multiple audiences and that the data may be presented differently to each audience. The following are the types of dashboards that each CMO shared with us:

	Type of dashboard	Metrics	Method	Frequency	Audiences
Uncommon	<i>Academic</i>	<ul style="list-style-type: none"> <li>▪ Interim assessments (compared to last year's cohort at same grade/subject; not disaggregated by specific subgroups)</li> <li>▪ Student attrition (month to month)</li> <li>▪ Enrollment &amp; attendance</li> <li>▪ Demographics (mostly for external audiences)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Data are disaggregated by schools</li> <li>▪ Results are not compared to specific targets but implicit goal is that measures will improve each year</li> </ul>	Quarterly	Home office management team, Board
	<i>Operational</i>	<ul style="list-style-type: none"> <li>▪ Enrollment</li> <li>▪ Wait list and attrition/transfers out</li> <li>▪ Attendance</li> <li>▪ Financial</li> </ul>	<ul style="list-style-type: none"> <li>▪ Data are disaggregated by schools</li> <li>▪ Results are compared to targets set each quarter</li> </ul>	Every 1-2 months	Home office management team, Board
LPS	<i>Academic</i>	<ul style="list-style-type: none"> <li>▪ Interim assessments</li> </ul>	<ul style="list-style-type: none"> <li>▪ Data are disaggregated by schools</li> <li>▪ Results are compared to targets set each quarter</li> </ul>	Every 1-2 months	Home office management team, Board
	<i>Financial</i>	<ul style="list-style-type: none"> <li>▪ Average Daily Attendance (ADA)</li> <li>▪ Enrollment</li> <li>▪ Free/Reduced lunch</li> <li>▪ Supplemental hours</li> </ul>	<ul style="list-style-type: none"> <li>▪ Data are disaggregated by schools</li> <li>▪ Results are compared to target goals based on the previous quarter</li> </ul>	Monthly	Home office management team, Board
	<i>Operational</i>	<ul style="list-style-type: none"> <li>▪ Staff recruitment pipeline</li> </ul>	<ul style="list-style-type: none"> <li>▪ Results are compared to target goals based on the previous quarter</li> </ul>	Quarterly	Home office management team, Board
	<i>Academic</i>	<ul style="list-style-type: none"> <li>▪ Interim assessments</li> </ul>	<ul style="list-style-type: none"> <li>▪ Data are disaggregated across schools</li> <li>▪ Results are not compared to specific targets</li> </ul>	Quarterly	Home office management team, Board, Principals

## KEY STRATEGIES

Considering the range of dashboards across and even within these CMOs, these three cases demonstrate a valuable set of development techniques for and practical uses of dashboards. The materials in the appendices provide actual examples of the unique dashboards used at all three organizations. While these documents are noticeably distinct from each other, all three organizations shared similar challenges and insights related to creating and using an effective performance dashboard. The following list of six key findings from our interviews with these CMOs should inform how you develop and use dashboards in your own organization.

### ***1. Determine what you need to know***

Being clear about the purpose of your dashboard will simplify the design and implementation processes. Milan Sevak, Director of Instruction and Assessment at LPS, noted that the organization did not plan sufficiently before designing the actual tools: in his opinion, LPS should have “[gathered] the right people in the room and decided what we really cared about and what levers impacted those things,” and then designed the tools around that vision. Gloria Lee, a Regional Vice President at Aspire and the former Chief Operating Officer there, expressed a similar sentiment, and regretted that Aspire did not take time early on to plan the entire system of goals, collection, and action related to the dashboard before they designed the actual tool. In contrast, Uncommon’s team purposefully determined the premise for its dashboard system in advance, seeking feedback from the management team on the underlying goals and design of the dashboard. When selecting these measures, it is important to keep in mind which metrics are relevant to mid-course corrections and planning.

**EXHIBIT 1**

*Taking time to consider what specific measures your dashboard will include and narrow your metrics down to only the most relevant*

**Uncommon Schools’ process of elimination**

Since Uncommon wanted to use its dashboard as a real-time tool focused on interim academic data, the team determined that some metrics that are critical to collect and analyze at year-end are in fact less relevant to making mid-course corrections to the academic program. Other seemingly important metrics were filtered out for a variety of other reasons. For example, homework completion data was eliminated because completion does not indicate whether the work the students turned in was of high quality. Budget data were eliminated because these numbers do not tell a clear story of a school’s academic performance.

The team also decided that suspension and detention rates were not directly correlated with academic performance and therefore should not be included in the dashboard. Other metrics were left out because the team saw them as assumptions already embedded in Uncommon’s culture. For example, a strong norm about teacher attendance at every school eliminated the need for a measure of faculty attendance. Similarly, the disaggregation of special education data was not included because Uncommon considers itself responsible for all students and therefore did not want to break out certain groups’ data and risk holding these groups to a different, lower standard. Below is a snapshot of a portion of the spreadsheet that the Uncommon team designed to sort and evaluate which metrics to include.

Metric	X to include			Notes
	Year-End Report Card?	Monthly Dashboard?	Both?	
% at benchmark on DIBELS, by grade		X		
Average daily attendance rate			X	
% students with X or fewer absences				
Average daily homework completion rate				
Average persistence rate (% of students enrolled at the beginning of the year who are still enrolled at the beginning of the following year)			X	What we really need is for this to be broken down: #/% lost due to leaving city, #/% lost due to academic failure/risk of retention, #/% due to discipline/not liking school culture
Completion rate (% of students who enrolled in the standard entering grade level of the school who graduated within one year of their expected graduation year)	X			Again, this needs to be broken down like above. It also should be separated into MS and HS categories.

## **2. *Remember that less is more***

Each CMO emphasized the need for simplicity. There is a natural propensity among these organizations to collect an excess of data, and all three CMOs acknowledged the ongoing, powerful temptation to present more data than was necessary. In the case of LPS, where multiple dashboards are used, one challenge has been the need to balance the organization's desire to have as much information as possible presented in one place with the goal of ensuring that information is not duplicated across multiple dashboards. It is important to keep in mind the precise purpose for each tool when reviewing what data should be included. Uncommon's experiences illustrate this point. To determine which metrics to include in the performance dashboard, the team generated a list of possible ways to measure the performance of a school, creating a map of approximately 2,000 measures. From there, they determined which of these measures would be most useful in driving student achievement during the school year.

Having gone through this rigorous process of elimination, Uncommon created a short list of academic-focused measures for its dashboard (see "Uncommon Dashboard" in Appendix), including interim assessment data and comparison data to last year's cohort at same grade, subject, and point in the school year. They also took into account relevant non-academic student data, such as student attrition, enrollment, and attendance, along with some basic demographic information. Uncommon's approach highlights the importance of investing resources and thought up front, in order to narrow the set of metrics that are included in a performance dashboard. Uncommon's method of soliciting ongoing team feedback while developing the dashboards is noteworthy. Please see Exhibit 1 for more information about Uncommon's approach. Narrowing your organization's metrics in order to align them with what you ultimately want to measure – and recognizing how certain metrics are related to pre-existing assumptions -- is a significant undertaking, both from an operational and a philosophical standpoint. To make this process as thoughtful and thorough as possible, it is critical to get input and buy-in from across your organization.

## **3. *Schedule and assign data collection to maximize efficiency***

It is important to estimate reasonable timeframes for the production of the tools, especially if your organization will rely on manual data collection and updating of the tools, as was done by all three of the CMOs in this study. At LPS, for example, several individuals are responsible for obtaining the data to populate the tools. As the tools are mostly department-specific, each department updates its own tools (e.g., the Finance Department updates the Financial Dashboard, etc.). Data are manually pulled from various sources, including Data Director, PowerSchool, and various Microsoft Excel sheets that are populated through in-person discussions with counselors and principals. LPS' data, like that of the other CMOs, is collected at various times throughout the year and used to produce the dashboards. Both LPS and Aspire agreed that creating calendars that dictate when different types of data will be collected has made populating the dashboards less of a burden on schools and easier for those team members responsible for collecting and aggregating data. See Exhibit 2 for more information about LPS' data collection calendar.

**EXHIBIT 2**

*Promoting a culture of expectations for populating your dashboard*

**LPS's data collection calendar**

CMOs realized that to keep dashboards live and up to date, they needed to track data collection in parallel with academic calendars and assessment schedules. Setting clear expectations around deadlines ensures the performance dashboards are completed in a timely manner, which keeps them relevant and informative. LPS uses a straightforward academic data timeline to pace its data collection efforts and set expectations well in advance for when data will need to be collected.

LPS Academic Data Timeline 2006-07											
Data Collection											
Results Available											
July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	June
<b>Benchmark Assessments</b>											
			Bnchmrk Assmnts	Bnchmrk Assmnts	Bnchmrk Assmnts	Bnchmrk Assmnts	Bnchmrk Assmnts	Bnchmrk Assmnts	Bnchmrk Assmnts	Bnchmrk Assmnts	
<b>State Assessments</b>											
CELDT (9-12)								CELDT (9-12)			
	CAHSEE (10-12)			CAHSEE (NP 11-12)		CAHSEE (NP 11-12)	CAHSEE (10 Census)	CAHSEE (10 make-up & NP 11-12)		CAHSEE (10 Census)	CAHSEE (10 make-up & NP 11-12)
	STAR (9-11)								STAR (9-11)		
								PFT (9 & 11)	PFT (9 & 11)		
<b>State Accountability</b>											
	API Growth & AYP							API Base & Ranks			
<b>Surveys</b>											
						School Staff	School Staff	Home Office Staff	Home Office Staff	School Staff Students Parents	School Staff Students Parents
<p><b>Acronyms</b></p> <p>CELDT = California English Language Development Test                  CAHSEE = California High School Exit Exam                  NP = Non-Passing (for CAHSEE)</p> <p>STAR = Standardized Testing and Reporting                  PFT = Physical Fitness Testing</p> <p>API = Academic Performance Index                  AYP = Adequate Yearly Progress</p>											

**4. Present data effectively**

All three organizations agreed that the level of clarity of how data are presented corresponded to the level of effectiveness of these dashboards as management tools. At Uncommon, for example, a great deal of time has been spent on making the dashboard easy to read. Bambrick notes: "Half [of the time invested to create a dashboard] is the information you choose, and half is how you present it." CMOs agreed that the tool must be simple and quick to review, and that it must reliably impart the same information to all readers. Simply making sure that the graphics read the same way in black and white as they read in color is an important factor in ensuring that interpretations of the data are consistent, particularly across different parties such as management teams and boards. This, in turn, ensures a greater likelihood for consensus on actions that should be taken based on the results of the dashboard.

Using simple graphics, LPS has made its dashboards particularly easy to interpret. An upward facing arrow (strong), a horizontal line (medium) and a downward facing arrow (weak) populate the "status" column of

each dashboard summary. These quick references (which are accompanied by a column of data and a comments column) allow any reader to quickly assess where a given school or region is excelling and what areas need improvement. This “status” column has an added benefit: these symbols represent an implicit set of qualitative performance standards by which the metrics in the dashboard are evaluated. These evaluations provide guidance to readers from different levels of the organization on how to analyze and react to the information presented in the dashboard, which leads to greater consensus in how metrics are interpreted. Please see Exhibit 3 for more information about LPS’ use of these graphics to indicate quality.

**EXHIBIT 3**

*Sending a clear message to all audiences*

**LPS’ use of graphics as summary indicators**

As the following section of LPS’ financial dashboard shows, each metric is marked with a simple symbol or “summary indicator” to provide a clear visual of the organization’s satisfaction with performance against this metric. For each metric, the summary indicator is accompanied by the before displaying the actual data for the month. This approach allows senior management, board members, and staff alike to interpret and weigh data along the same scale. This type of consensus on what data means can facilitate better data analysis discussions, which keeps the organization’s staff and board focused on particular areas in need of improvement where specific action should be taken.

**Summary Indicators**  
 ▲ on track  
 ↔ neutral  
 ▼ needs attention

Metric	Summary Indicator ▲/↔/▼
Cash Balance	▲
Revenue	↔
Expense	▲
Surplus/(Deficit)	▲
ADA	↔
ADA Percentage	↔
Average Enrollment	↔
Current Enrollment	▼
Supplemental Hours	▼
Free/Reduced Lunch	▲

**5. Set goals**

Once a dashboard is populated with data, the results should be held against your organization’s standards. This can involve setting specific targets for growth compared to previous quarters, or can simply mean being mindful of what you compare your data against. Uncommon compares interim assessment data for the current year’s cohort of students to the cohort of students who took the same test at the same point in time the previous year. Although there are no explicit goals set for progress on these comparative measures, the implicit goal is that each measure will improve each year and that attendance will be at least 95%.

Aspire’s dashboard is produced every one to two months. Aspire’s team decided early on that it would measure interim and annual data against specific quantitative goals, allowing any reader to compare actual

results to the relevant goal. At LPS, some metrics are measured against target goals, while for others those targets are under development. Specifically, goals have been set at LPS for the Recruiting and Finance Dashboards, but not for the Educational Dashboard.

A powerful approach to setting performance targets for dashboard metrics is to map each interim dashboard to your organization's annual goals, which are likely set by the management team and endorsed by the board through a rigorous strategic process. In the same way that interim assessments for students are most informative when they are aligned with the annual state performance exam, aligning your organization's dashboard targets to your annual performance targets is a way to ensure that the dashboards are gauging progress toward these overarching goals. This process requires careful work to track backwards from your organization's annual goals and evaluate the extent to which the organization needs to advance on a monthly or quarterly basis in order to reach that goal.

## **6. *Communicate and act on data***

Dashboard tools, while helpful, are not necessarily drivers of educational progress. Each organization emphasized that having a dashboard alone, no matter how timely and accurate, will not improve your schools. Rather, it is the interpretation and action taken place as a result of the information presented by the dashboard that is the lever for generating change. A first step toward acting on data is to make sure that your organization has a plan for effectively disseminating data across the various levels of the team. For example, at Uncommon, this process is laid out in a way that ensures that every level of the organization has exposure to the data. Once the data are collected by each school's operations director, the dashboard is passed on to the principal of that school and managing director of that school network. The managing director then passes data on to both the boards of trustees of each Uncommon network and to Uncommon's home office operations director, who shares it with Uncommon's senior management.

Once dashboards have been properly disseminated, teams must allot time to discuss the results and key findings. The Aspire team emphasized that those who use the data (the management team, for example) must make time within regularly scheduled meetings to fully review what the data says about each individual school. Aspire found that simply distributing the data without a group discussion was less powerful than when the group took the time to discuss the results together. Moreover, different levels of framing and analysis are appropriate for different audiences for the dashboard. For example, while there is likely some value for teachers, principals and home office staff in going through a group process of digesting the data and developing action plans, this type of exercise would not be appropriate for the board. Rather, a synopsis of the dashboard's most relevant findings, action steps that the organization will take as a result, and how the organization's current performance relates to its annual performance targets are all appropriate actions for the board. Please see Exhibit 4 for a description of how Aspire engages its board with its dashboard.

Productive conversations and actions plans that emerge from performance dashboard data are ultimately what keep these tools grounded in the real work of the organization and make the tools critical for driving an organization's success. Designing a tool from start to finish should involve careful consideration of how the tools will fuel such conversations, and which team members will facilitate the development of action plans around the findings that they yield.

**EXHIBIT 4**

*Using dashboards to devise strategy*

**Aspire’s purposes and goals around sharing dashboards**

Aspire is highly intentional about how data can best be shared with board members and around keeping their board members informed about data-driven decision making at the school and organizational level. What follows are two sample slides from the regular presentations that Aspire makes at board meetings around student data. While the first slide explains Aspire’s use of annual (versus interim) data, Aspire uses a similar method when presenting interim data.

### Purposes

- To share the analysis done on the STAR results at the school level.
- To show a school plan based on its data
- To share the systems for monitoring the implementation of the plan and student achievement

Another slide illustrates how relevant data from Aspire’s dashboards are put to use: school action plans are developed to address the issues the dashboards bring to light, including negative trends or cycles and even stagnant or slow growth. By presenting the dashboards data to the board in this way, Aspire allows the board to focus on high-level, strategic issues related to the data, rather than simply looking at numbers and statistics.

### Implications for School Plan

**TEACHER V**

STRATEGY	STEPS TO IMPLEMENT	EVALUATION	WHO IS RESPONSIBLE?
Monitor pacing of standards in language arts	Mandate Aspire pacing guide	Monthly walkthrough with pacing guide	Diana Alicia Elise
Increased assessment of students in language arts	Require interim assessments every 6 weeks based on the pacing chart	Analysis of interim assessment data	Diana Elise
Increase professional development	Aspirewide professional development in writing strategies	Cycle of Inquiries on writing strategies	Alicia Diana

Insisting that dashboards have implications for school plans ensures that data remain a driving factor for Aspire’s strategy and illustrates the dynamic role that a well-used dashboard can play in an organization that is focused on continuous improvement.

## AREAS FOR DEVELOPMENT

Beyond the methods presented in this study, there are other ways to further increase the usefulness of performance dashboards through more rigorous data analysis. All three CMOs in this study plan to improve their use of interim assessment data and performance dashboards to compare results across schools and across departments within schools. Rolling up data across schools can provide additional insight into how an organization is performing overall, and identifying where organization-wide successes and challenges have arisen. Moreover, by comparing data across schools or across departments within schools, successful strategies at one school can be identified and then applied to schools that are struggling in that area. Additionally, it may be useful to compare current performance trends with historical trends in order to track progress over time and with prior years' dashboards. Consider using data over time throughout the course the year – for example, comparing period 1 results with period 2 results – as a potentially useful way to analyze data and trace the progress of a student cohort, school, or entire organization. However, it is important to remember that these dashboards should serve as dynamic tools that inform the organization's decision making. As such, organizations should not shy away from adjusting them as needed, even at the expense of longitudinal data analysis.

## CONCLUSION

The three CMOs profiled in this study use performance dashboards to compile, track, analyze, and react to trends in their academic, operational and financial progress. All three have demonstrated the importance of aligning performance dashboards with the overall strategy of their organizations. By doing so, dashboards become increasingly powerful tools that can drive decision making. As stakeholders begin to recognize the potential utility of dashboards in informing decisions, they are more likely to accurately and dynamically populate and use these tools, thereby further strengthening the dashboards' effectiveness. CMOs can use a variety of techniques to integrate dashboards into their organization's work. For example, Uncommon involves its entire team in deciding what to include in the dashboard metrics, LPS uses easy-to-understand graphics to ensure consistent interpretation of the data across the organization, and Aspire uses data to consistently inform decision making with their board. Activities like these are what build momentum for the design and implementation of performance dashboards and contribute to making them increasingly useful management tools over time.

Integrating dashboards into the culture and practices of an organization requires putting a deliberate emphasis on the importance of collecting data and the usefulness of these tools in driving decision making. We encourage you to consider developing and incorporating these tools for use in your own organization.

**APPENDICES: SUPPORTING MATERIALS AND ADDITIONAL RESOURCES**

**Appendix I: LPS Academic Dashboard**

LPS uses this dashboard to track not only proficiency based on quarterly benchmark assessments, but also college readiness and school culture metrics.

LPS Education Dashboard												April 18, 2007 Board Meeting				Last Updated: 4/12/2007						
												1		2		3		4		5		
<b>ACADEMICS</b>	<b>3rd Benchmark Assessment Results</b>																					
	<b>English Overall</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	
	Grade 9	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	
	Grade 10	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	
	Grade 11	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	
	Grade 12	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	
	<b>Math Overall</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	
	Algebra	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	
	Geometry	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	
	Algebra 2	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	
	<b>Science Overall</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	
	Biology	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	
	Chemistry	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	
	<b>Soc Sci Overall</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	<b>% PRO+</b>	<b>% BAS+</b>	
	World Hist 9	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	
World Hist 10	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%		
US Hist 11	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%		
<b>COLLEGE-READINESS</b>	<b>CA High School Exit Exam (CAHSEE) Results - Cumulative</b>																					
		<b>% Passed</b>		<b>% Passed</b>		<b>% Passed</b>		<b>% Passed</b>		<b>% Passed</b>												
		<b>English</b>	<b>Math</b>	<b>English</b>	<b>Math</b>	<b>English</b>	<b>Math</b>	<b>English</b>	<b>Math</b>	<b>English</b>	<b>Math</b>	<b>English</b>	<b>Math</b>	<b>English</b>	<b>Math</b>	<b>English</b>	<b>Math</b>	<b>English</b>	<b>Math</b>	<b>English</b>	<b>Math</b>	
	Grade 10	?	x%	x%	?	x%	x%	?	x%	x%	?	x%	x%	?	x%	x%	?	x%	x%	?	x%	x%
	Grade 11	?	x%	x%	?	x%	x%	?	x%	x%	?	x%	x%	?	x%	x%	?	x%	x%	?	x%	x%
	Grade 12	?	x%	x%	?	x%	x%	?	x%	x%	?	x%	x%	?	x%	x%	?	x%	x%	?	x%	x%
	<b>Progress Towards Meeting UC (a-g) Credit Requirements</b>																					
		<b>% On Track</b>		<b>% On Track</b>		<b>% On Track</b>		<b>% On Track</b>		<b>% On Track</b>												
	Grade 9																					
	Grade 10																					
Grade 11																						
Grade 12																						
<b>Grade 12: HS Grad-Ready &amp; College Admissions</b>																						
% HS Diploma Ready			In Process																			
% 4Yr College Admitted			X%																			
<b>CULTURE</b>	<b>Student Culture</b>																					
	Clubs/sports % involved		<b>X%</b>		<b>X%</b>		<b>X%</b>		<b>X%</b>		<b>X%</b>		<b>X%</b>		<b>X%</b>		<b>X%</b>		<b>X%</b>		<b>X%</b>	
	Transfers	?	IN y	OUT y	?	IN y	OUT y	?	IN y	OUT y	?	IN y	OUT y	?	IN y	OUT y	?	IN y	OUT y	?	IN y	OUT y

LPS also uses a dashboard to track recruitment efforts and new hires.

LPS Recruiting Dashboard as of 4/1/07									
Open Positions	Total Budgeted	Open Positions (FTE)				Hiring			Positions To Be Filled
		New Positions	Transfers Out	Attrition Estimate	Total Open Positions	Offers Pending	Transfers In	Hires	
<b>Region 1</b>									
Teachers	16.50	-	-	4.50	4.50	-	-	-	4.50
Admin	7.20	0.50	-	3.00	3.50	-	1.00	-	2.50
<b>Total</b>	<b>23.70</b>	<b>0.50</b>	<b>-</b>	<b>7.50</b>	<b>8.00</b>	<b>-</b>	<b>1.00</b>	<b>-</b>	<b>7.00</b>

## Appendix II: Aspire's Financial Dashboard

		Region 1					
		School #1	School #2	etc.			
		#	#	#	#	#	#
<b>CURRENT ENROLLMENT</b>							
Net change from 9/15/06		x	x	x	x	x	x
<b>ADA</b>	January	x%	x%	x%	x%	x%	x%
	February	x%	x%	x%	x%	x%	x%
	March	x%	x%	x%	x%	x%	x%
<b>Re-enroll</b>	% of enroll	x%	x%	x%	x%	x%	x%
	% from feeder	x%	x%	x%	x%	x%	x%
<b>Wait list</b>	06-07						
	#	y	y	y	y	y	y
	% of enroll	x%	x%	x%	x%	x%	x%
<b>Transfers Out</b>	January-07	-	-	-	-	-	-
	February	-	-	-	-	-	-
	March	-	-	-	-	-	-
<b>FFFL forecast (thousand)</b>	05-06	\$X	\$X	\$X	\$X	\$X	\$X
	January	\$X	\$X	\$X	\$X	\$X	\$X
	February	\$X	\$X	\$X	\$X	\$X	\$X

## Appendix III: Uncommon's Academic Dashboard

### KEY SCHOOL DEMOGRAPHICS

USI Dashboard Sample

#### Enrollment Breakdown

Male	x%	Black	x%
Female	x%	Latino	x%
Free/ Reduced Lunch	x%	White	x%
Special Ed	x%	Asian	x%
ELL./LEP	x%	Other	x%
Last updated:	xxx		

#### Staffing

Category	#	Student Ratio
FTE Teachers	x	x
Administrators	x	x
Total Staff	x	x

Avg Class Size x

### ENROLLMENT AND ATTENDANCE OVER TIME

#### Schoolwide Enrollment

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Actual Enrollment	N/A	x	x	x	x	x	x	x	x	x	x	x
Budgeted Enrollment	N/A	x	x	x	x	x	x	x	x	x	x	x

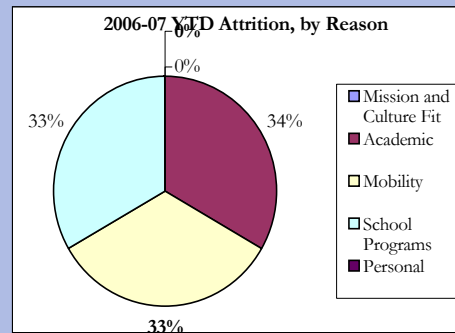
indicates actual enrollment below budgeted enrollment  
 indicates 5% increase/decrease over previous month's enrollment

#### Attrition Rate: # of Students Leaving the School

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	YTD #	YTD %	YE %
'06-07	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
'05-06	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x

#### Reasons for Attrition: Students Leaving from 1-Sep to 28-Feb

Date	Gr.	Reason
16-Oct	7	Mobility: Exam School
3-Nov	5	Academic: Parent-Initiated
3-Nov	7	School Programs: Transportation



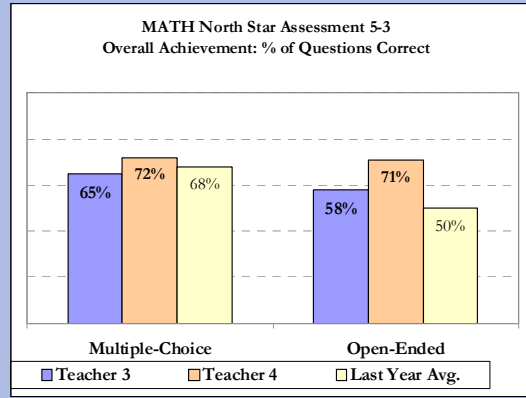
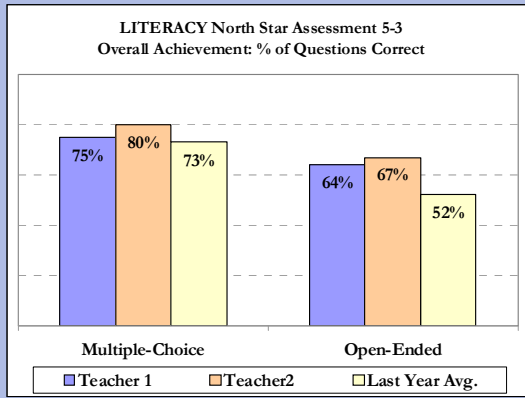
#### Average Daily Attendance

	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	YTD%	YE %
2006-07	N/A	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
2005-06	N/A	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%

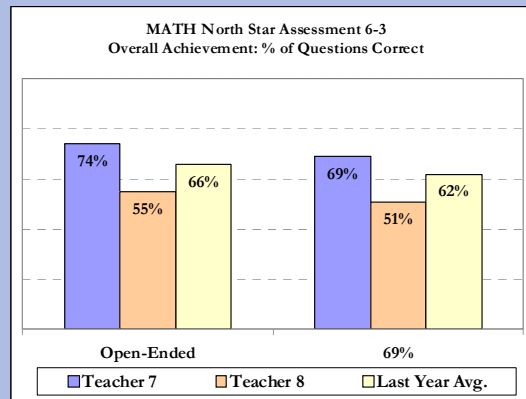
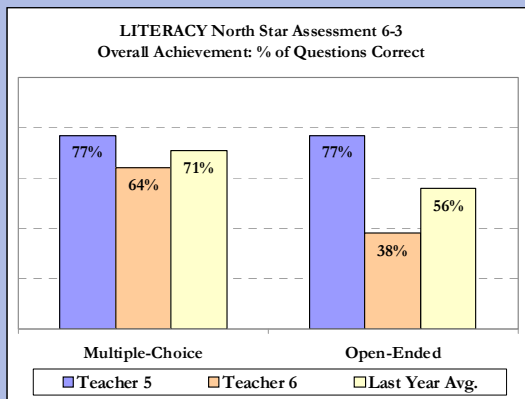
## Appendix III continued : Uncommon's Academic Dashboard

### STUDENT ACHIEVEMENT: INTERIM ASSESSMENT DATA

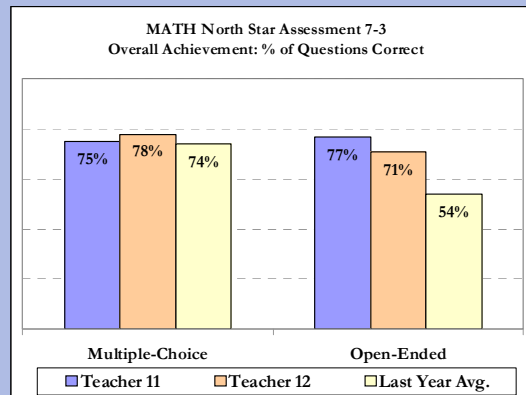
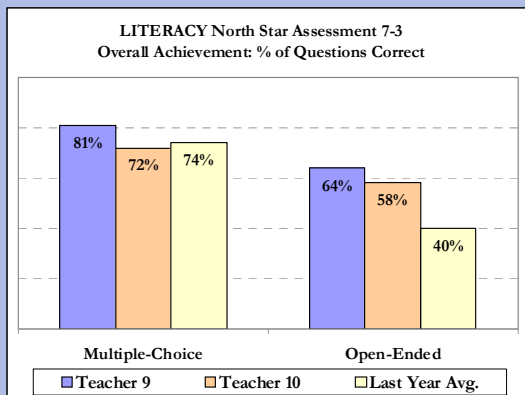
#### Grade 5



#### Grade 6



#### Grade 7



## Appendix IV: Sample Performance Dashboard Measures

### ACADEMIC DATA

- Percentage Proficient on standardized tests
- Number of Correct Scores on interim assessments (by question)
- Percentage Proficiency + and Basic + on interim assessments by subject
- Power standards (percentage correct, listed by standard)
- Percentage passing high school exit exam
- State rankings
- Progress toward meeting credit requirements
- Percentage high school diploma-ready
- Percentage graduated
- Percentage admitted to 4-year college
- Improved in writing (2 levels of growth)

### ORGANIZATIONAL DATA

- Demographics
- Enrollment
- Average Daily Attendance
- Student Attrition/ Number of Transfers Out
- Staff Attrition (and reasons for)
- Average Class Size/Student Ratio
- Waitlist by month (year to year)
- Re-enrollment rate
- Percentage of students involved in clubs/sports
- Staff total open positions/offers pending/positions to be filled
- Staff diversity statistics
- Drop Outs
- Suspensions
- Number of Parent Volunteer Hours
- Community Service Hours
- Teacher Grade for school (teacher satisfaction)
- Parent Grade for school (parent satisfaction)
- Teacher performance (score created in teacher evaluation)

### FINANCIAL DATA

- YTD Revenue
- YTD Expense
- YTD Income
- YTD Cash Balance
- Per Pupil Expenditures
- Per Pupil Income
- Variances to date
- Supplemental Hours
- Fundraising (School-based and central office)
- Facility Cost/Quality