



CREATING FUTURES SO BRIGHT

OCTOBER 20-23, 2014 • MIAMI, FLORIDA

Promoting Performance
Strategies for Developing Annual Performance Reports





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Objectives of this Session

- The importance of producing annual performance reports
- The elements of strong reports
- Strategies for producing reports
- Strategies for leveraging the reports



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Presenters

Mary Bradley

Central Michigan University

Carol Mehesy

Denver Public Schools

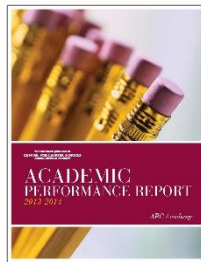
Charles Speiker

Volunteers of America—Minnesota

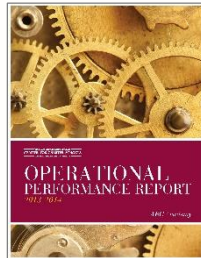


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Central Michigan University Annual Performance Suite of Reports



ACADEMIC
PERFORMANCE
REPORT

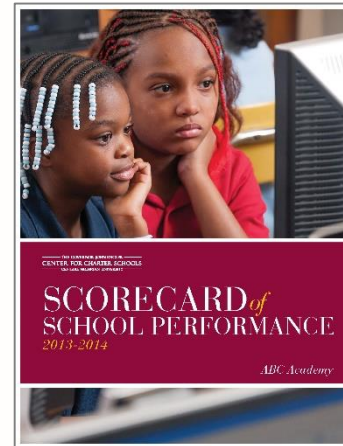


OPERATIONAL
PERFORMANCE
REPORT



FISCAL
PERFORMANCE
REPORT

SCORECARD



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Central Michigan University Annual Performance Suite of Reports

- Driven by performance contract and expectations
- Communication mechanism for performance
- Includes demographics
- Educational tool
- Provides transparency



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Central Michigan University Academic Performance Report

Performance Contract—Educational Goal

Achievement and Growth Measures

Performance Series or NWEA MAP

EXPLORE, PLAN, ACT

State Reported Accountability

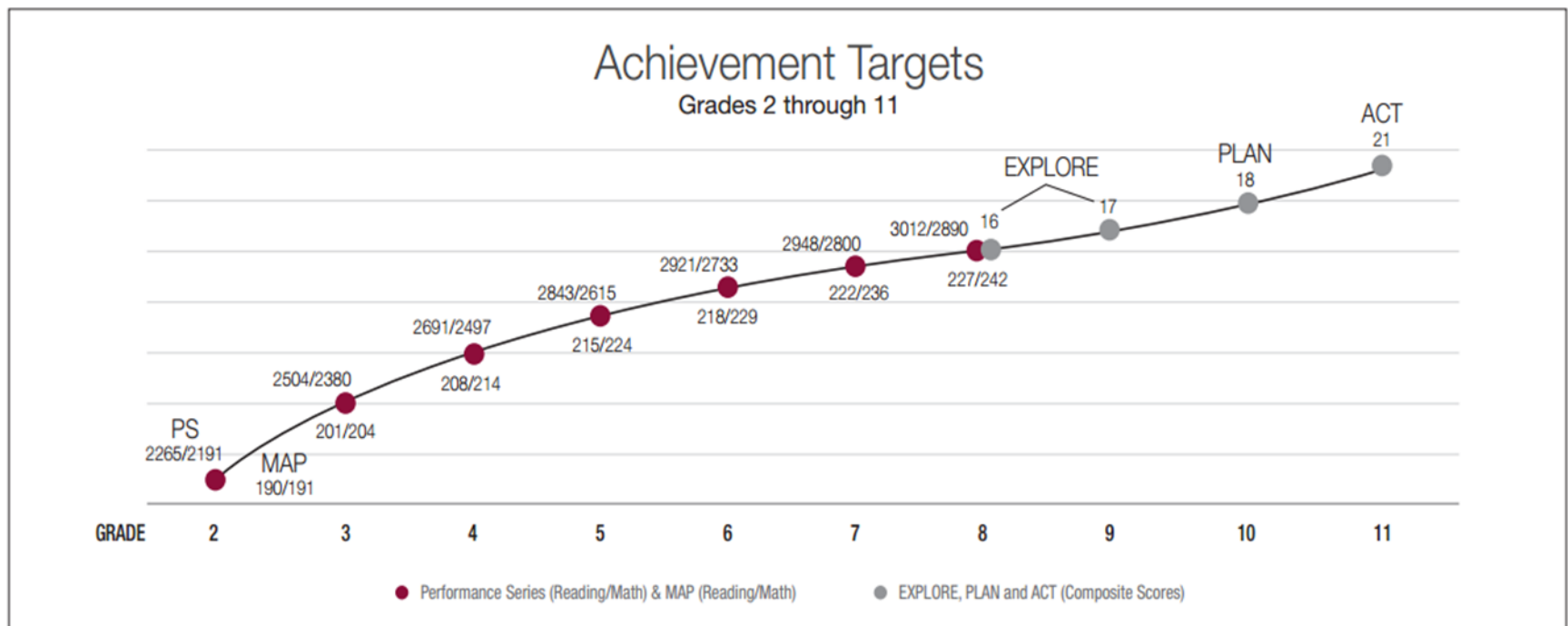
MEAP/MME

Composite Resident District (CRD)



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Central Michigan University Academic Performance Report chart example

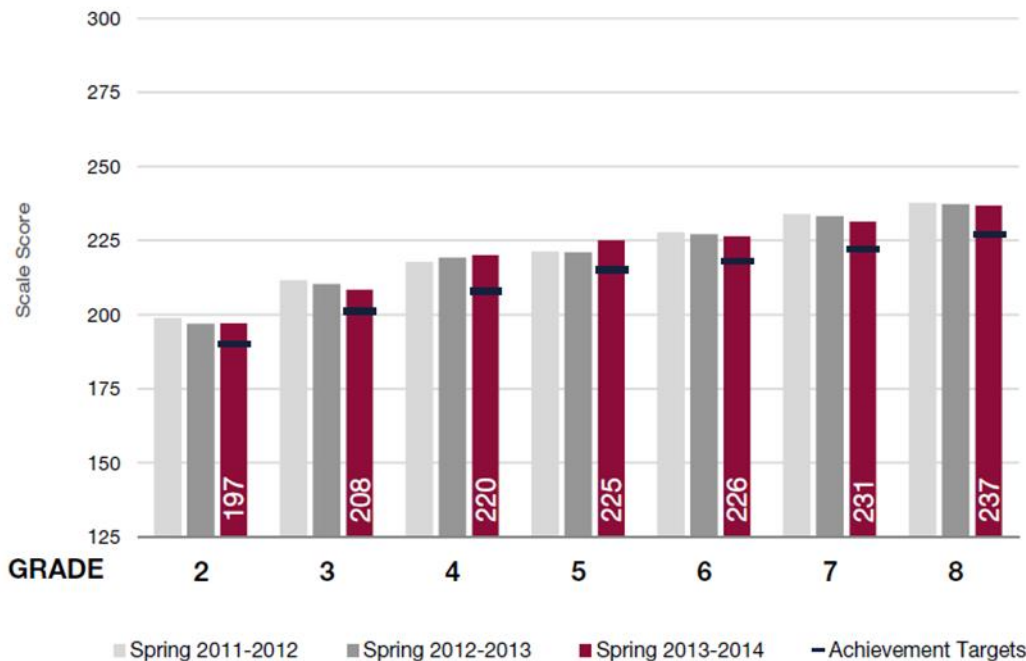




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Central Michigan University Academic Performance Report chart example

Reading



Percent of Students Meeting the Target ENROLLED FOR THREE¹ OR MORE YEARS

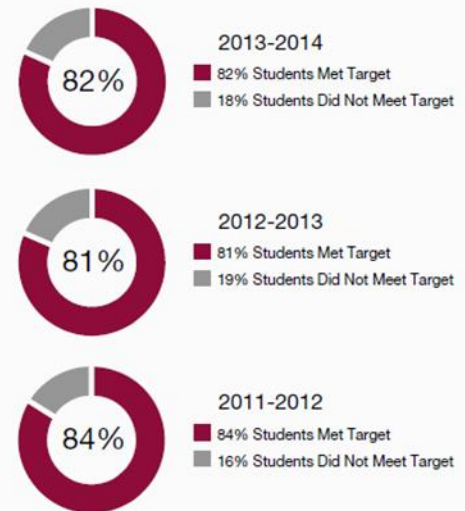


Fig. 11



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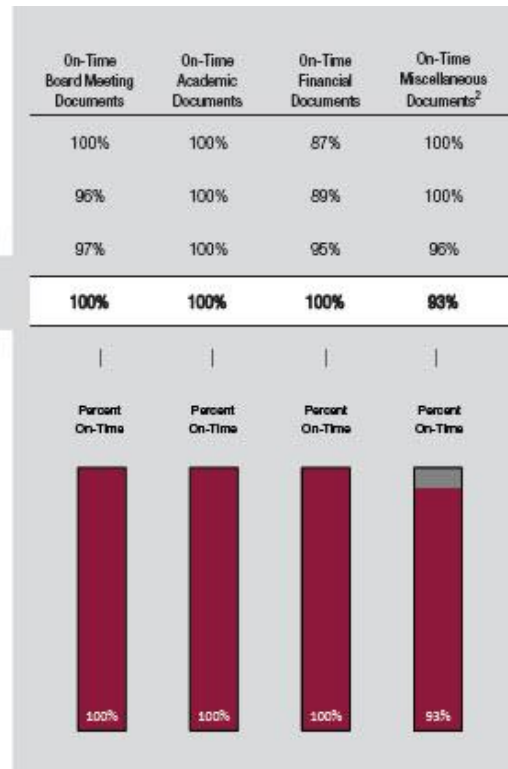
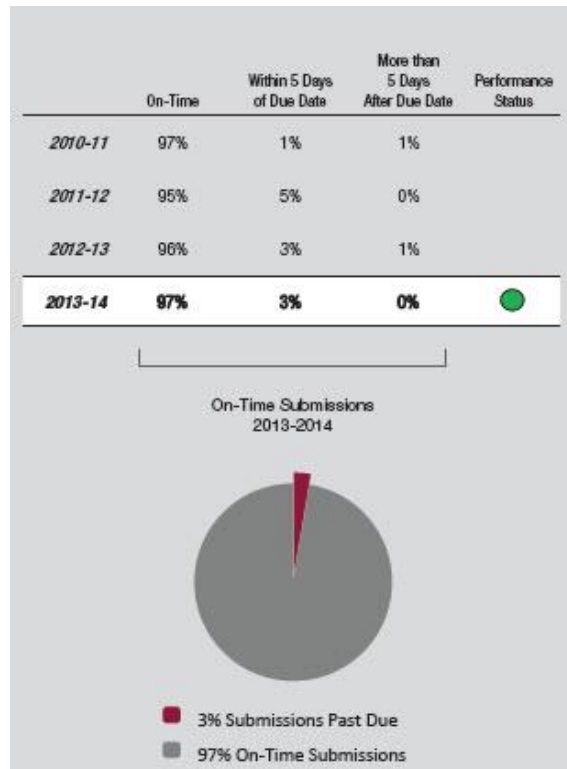
Central Michigan University Operational Performance Report

- **Compliance**
Legal Compliance and Document Submission
- **Charter Contract History**
Key changes, Amendments, Notice of Intent to Revoke
- **Academy Board**
Meetings, Academy Board Information, Attendance, Vacancies
- **Operational Reviews**
Staff Review, Site & Facility Review, Board Policy Compliance



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Central Michigan University Operational Performance Report chart example

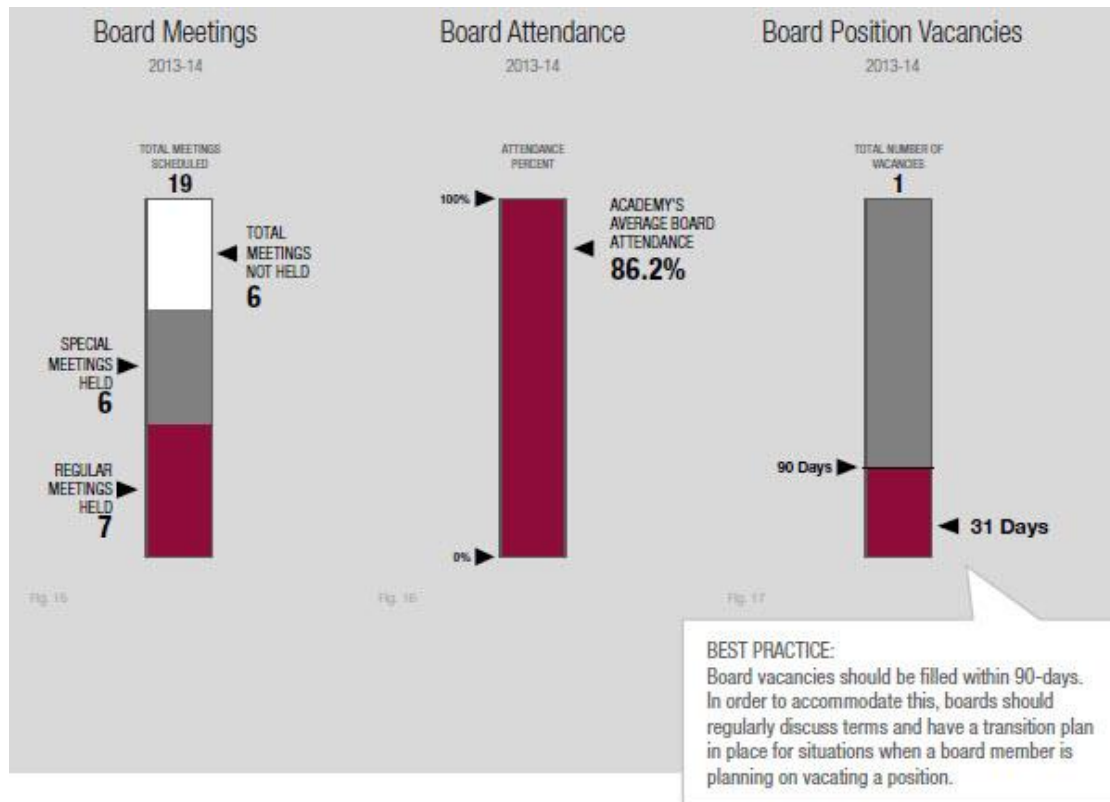


Policy Information	Perf. Status	Fall 2013	Spring 2013
Policies are Current	●	N	N



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Central Michigan University Operational Performance Report chart example





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Central Michigan University

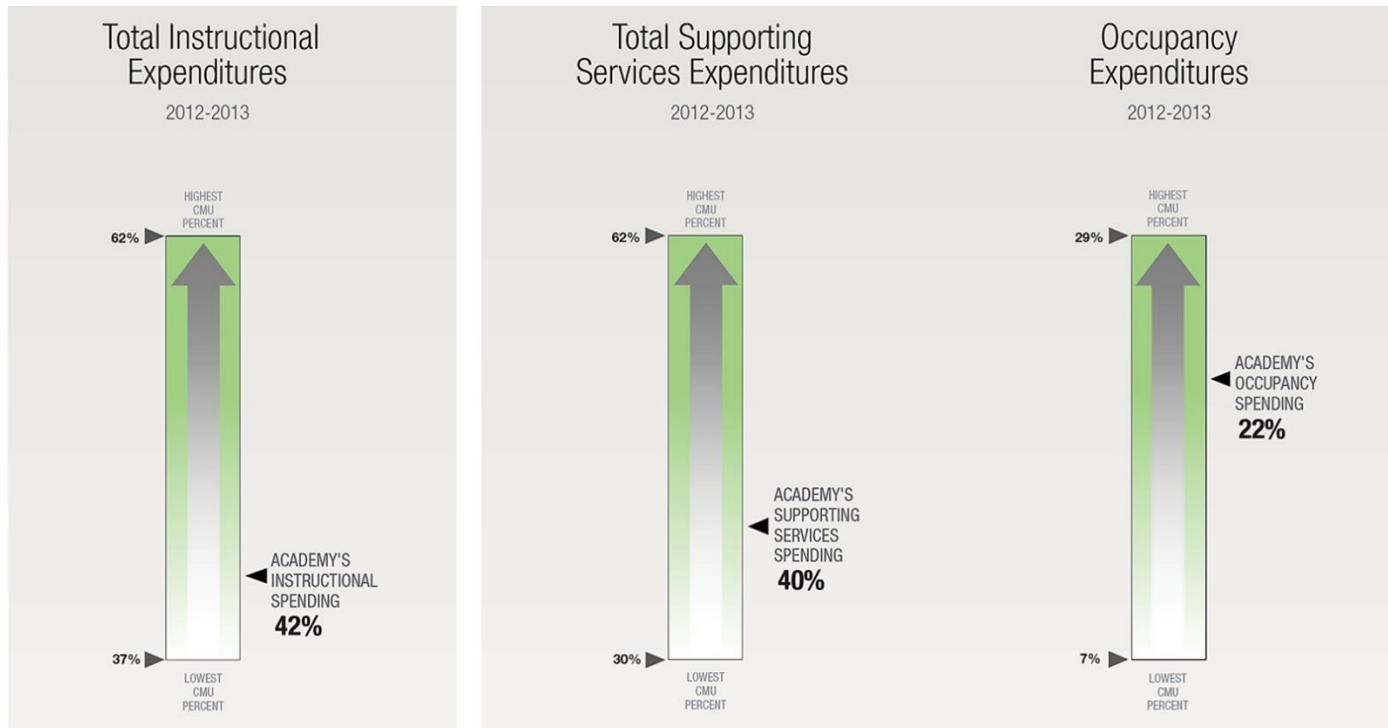
Fiscal Performance Report

- Analysis of Financial Information
- Annual Financial Audit
 - Management Letter Items and Responses
- Borrowings
 - Short-Term and Long-Term



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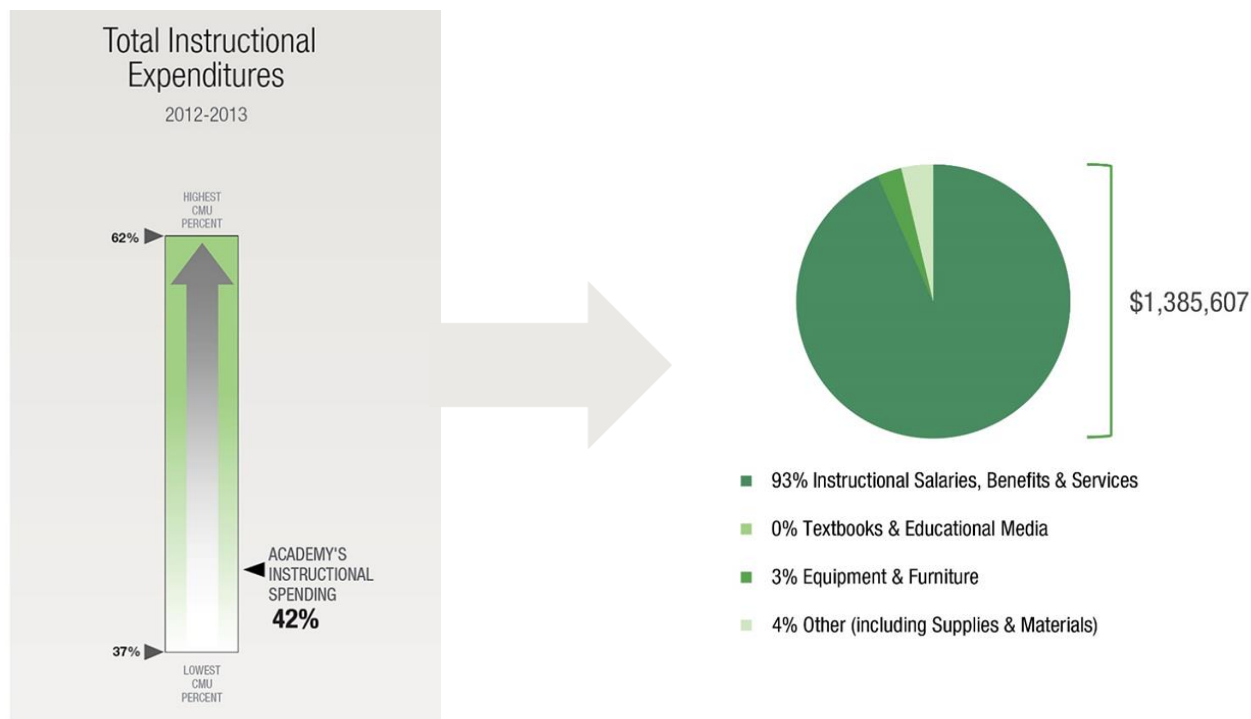
Central Michigan University Fiscal Performance Report chart example





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Central Michigan University Fiscal Performance Report chart example





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Central Michigan University Public Availability

All performance reports are available to the public and posted on the office's website



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Central Michigan University Production of the Report

- Focus Groups
- Based on performance contract and expectations
- Key—Data collection, storage and analysis

Team

- Content Area Experts
- Data Analysis Team
- Project Manager
- Organizational Leadership



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Central Michigan University

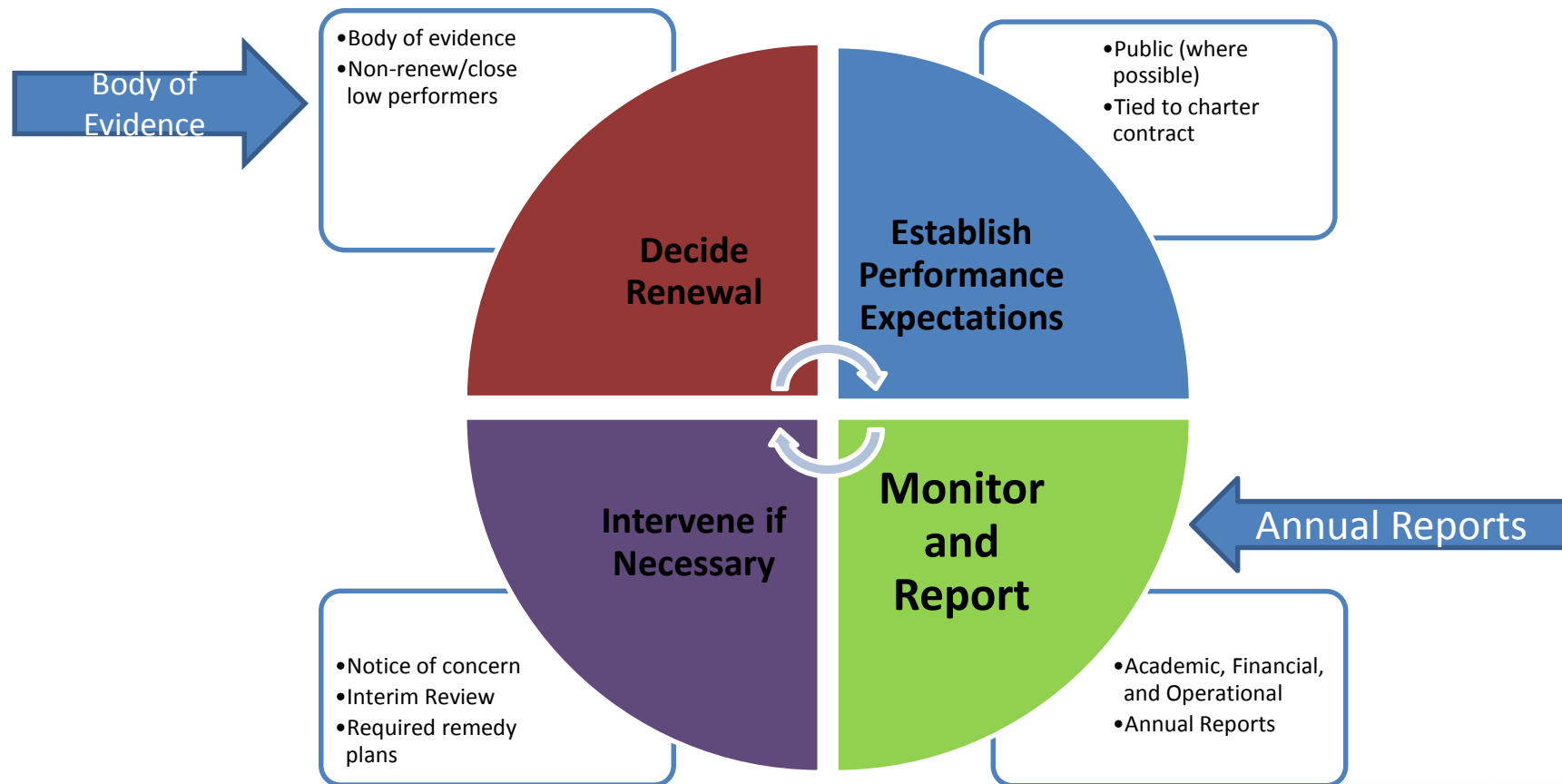
Leveraging performance reports

- Communication of Performance
- Educational Tool
- Assists in making informed decision
 - Authorizer, Academy Board, Administrator
 - Field Team
 - Presentation at board meetings
 - Leveraged during conversations
 - On-going conversations



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Denver Public Schools: Accountability and Quality Assurance Lifecycle





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Denver Public Schools

Public Accountability: Audience and Information Shared

Audience	The “Why”	The “What”
General Public	<ul style="list-style-type: none">• Build public will for quality schools and authorizing• General transparency and public accountability	<ul style="list-style-type: none">• Academic – School Ratings published (SPF) and reported in media• Financial – financial information posted on district and school websites (Financial Transparency Act)
Parents/ Guardians	<ul style="list-style-type: none">• Inform parent choice in schools• Transparency and accountability	<ul style="list-style-type: none">• Academic – SchoolChoice Guide with school SPF ratings sent to all parents, Parent Portal• School-level meetings annually with “red” schools• Financial – financial information posted on district and school websites (Financial Transparency Act)
Charter Boards & Leaders	<ul style="list-style-type: none">• Accountability for school-specific performance• Build governance capacity through data• Drive remedy plans	<p><u>Annual Report</u></p> <ul style="list-style-type: none">• Academic – School overall rating (SPF), Proficiency, Growth, Equity data compared to district and similar schools• Financial – Overall financial performance rating (FPF), operating margin, debt burden, revenue, liquidity, etc• Operational – Enrollment, compliance, governance



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Denver Public Schools - Annual Report Components

- **Academic Performance**

- Overall Rating
- Growth
- Proficiency
- Equity of Outcomes

- **Financial Performance**

- Consistency of revenue (enrollment trends, dependence on private fundraising)
- Use of operating dollars on instruction
- Operating Margin
- Debt Burden
- Liquidity and Reserves
- Coverage of fixed costs

- **Operational Performance**

- Enrollment Trends
- Compliance
- Governance



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Denver Public Schools Annual Report Components: Academics

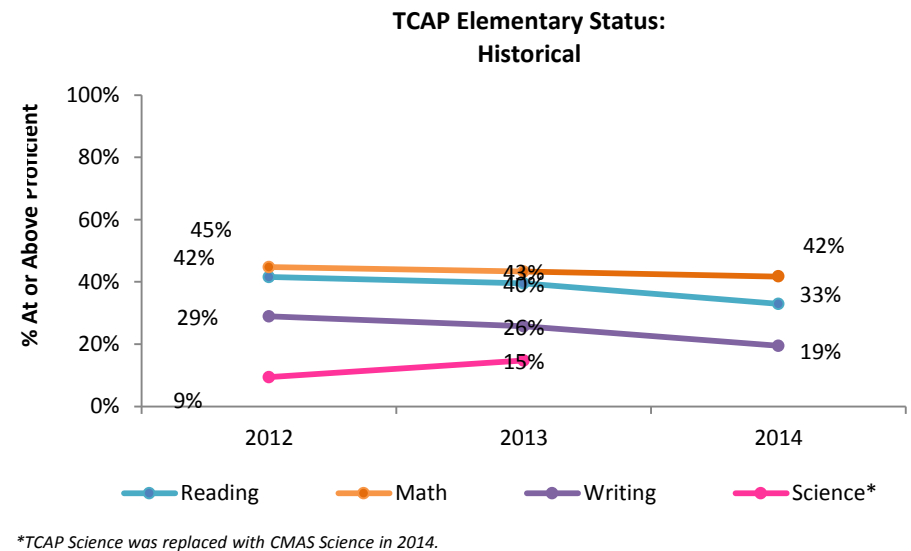
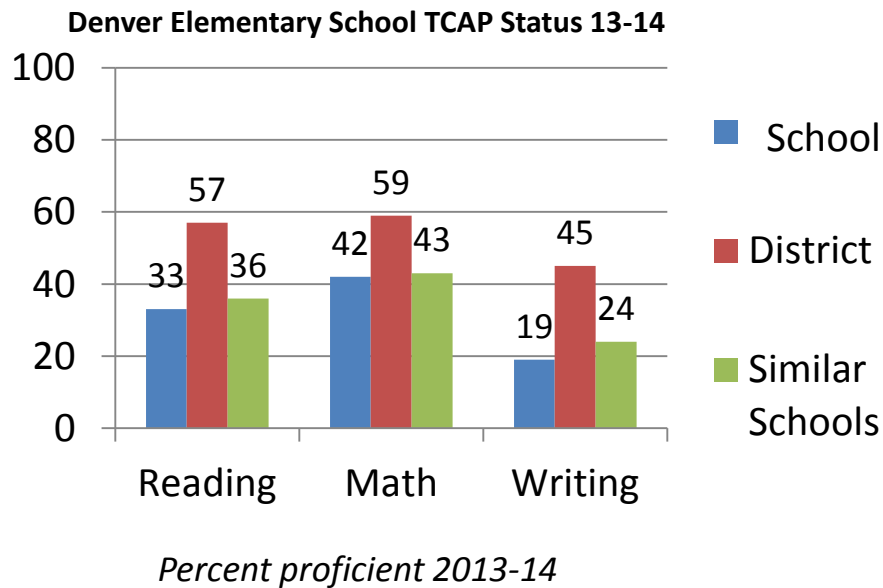
School's Overall Ratings – Three Year Snapshot

District School Performance Framework					
2012					
Overall	Growth	Status	Student Engagement	Post Secondary Status	Post Secondary Growth
52%	51%	33%	33%	48%	71%
2013					
Overall	Growth	Status	Student Engagement	Post Secondary Status	Post Secondary Growth
49%	70%	33%	50%	18%	53%
2014					
Overall	Growth	Status	Student Engagement	Post Secondary Status	Post Secondary Growth
45%	58%	43%	33%	14%	46%



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Denver Public Schools Annual Report Components: Academics

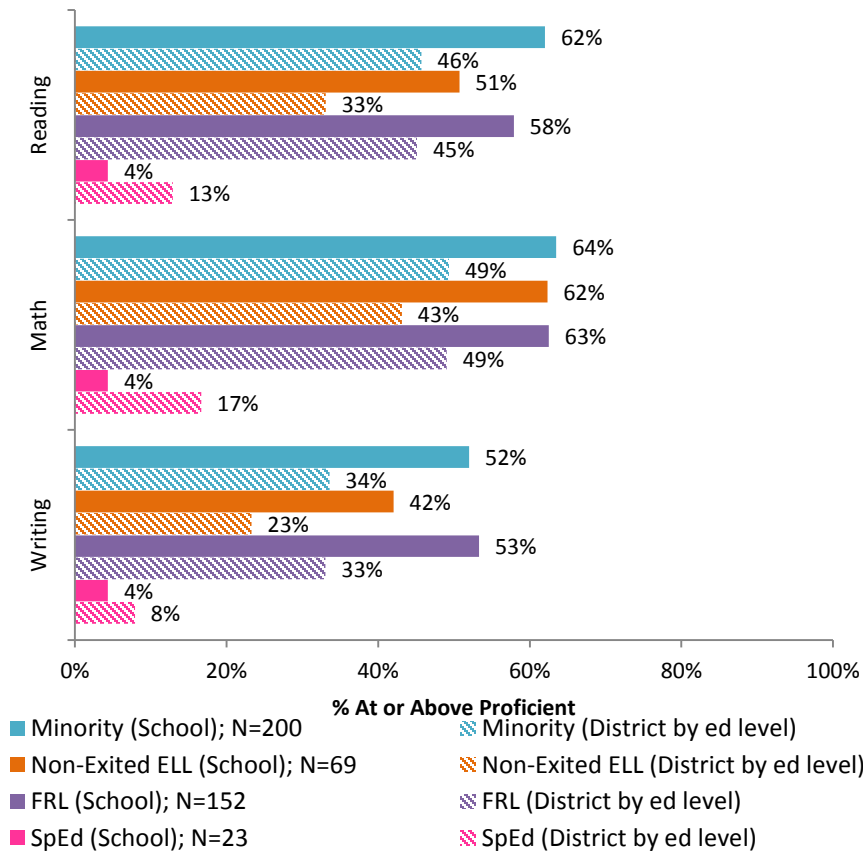




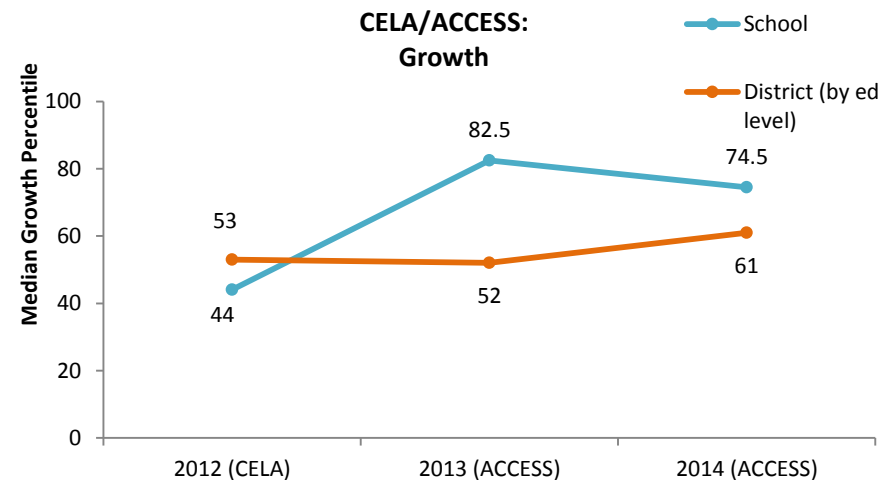
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Denver Public Schools Annual Report Components: Equity

**Achievement Gap
2013-14 TCAP Proficiency**



English Language Learners



NOTE: 2012-2013 was a transition year between CELA and WIDA ACCESS. 2013 MGPs were calculated based on students' previous CELA performance compared to their current year's ACCESS performance.



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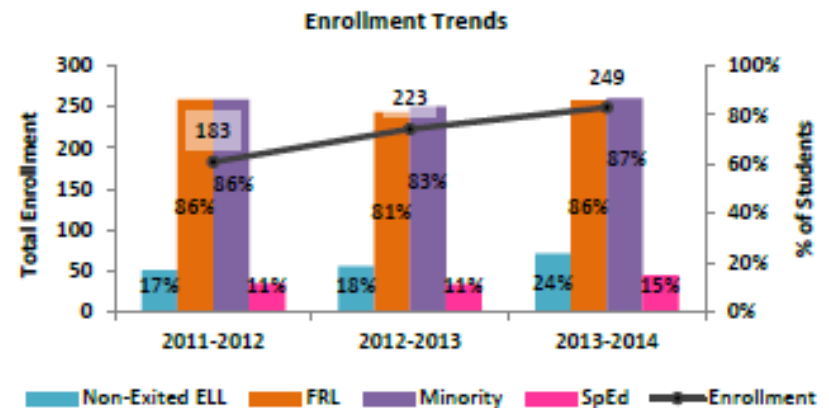
Denver Public Schools

Annual Report Components: Financial & Operational

Financial

	Audited FY14	Audited FY13
Enrollment		
10/1 Enrollment as a % of School Budgeted Enrollment	94.737%	79.333%
% Change in Enrollment from Prior Year	-24.370%	N/A
Consistent Revenue		
Private Contributions as a % of Total Expenditures	8.43%	4.436%
Coverage of Fixed Costs		
Occupancy Expenses as a % of Total Expenditures	16.297%	21.763%
Operating Margin		
Operating Margin	-2.529%	2.952%
Use of Operating Dollars in Support of Instruction		
Total Instructional Expenses as a % of Total Expenditures	47.786%	45.423%
Liquidity & Reserves		
Months Unassigned Fund Balance On Hand	0.065	0.139
Liquidity		
Current Ratio	1.582	1.088
Debt Burden		
Debt to Asset	1.024	1.004

Enrollment



DPS track overall enrollment, re-enrollment and equity of enrollment (FRL, SPED, ELL)



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Denver Public Schools -Leveraging Annual Reports

Accountability

- Annual reports accompany formal notice of concern to charter board
- Serve as basis for required remedy plan from charter board (may include interim performance goals)

Capacity Building

- Meetings with boards of schools not meeting expectations to go over report and specific performance concerns
- Interim performance goal setting with charter boards

Body of Evidence

- Annual report becomes key part of the body of evidence considered at renewal



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Volunteers of America OVERSIGHT ACTIVITIES SAMPLES

- Review of Communications
 - Board Packets and emails every Month
 - Local webs, state audits and data bases
- Site Visits with Rubrics
- Board Observations with Format
- Annual Report Packages on Schools



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Volunteers of America ANNUAL REPORTS-OVERSIGHT

Site Visitations include

- Plant and staff review

- Climate, operations and goals review

Package of Annual Reports on

- Academics

- Governance

- Finance



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Volunteers of America PRODUCTION OF REPORTS

- Review of Contract Expectations
- Create Standards and Indicators of Success
- Review Current Statutes and Regulations
- Review State and Local Data Bases
- Site Communications
- Use Field-Experienced Experts



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Volunteers of America

GOVERNANCE DATA

- Compliance with Statutes, Codes and Regulations
- Ethical Duties of Caring, Loyalty and Obedience
- Best Practices to assure.....

Proper engagement

Proper conduct of business

Strategic direction and goal attainment



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Volunteers of America

SAMPLE GOVERNANCE STANDARDS

- The board functions with proper membership.
- The board is free from conflicts of interest.
- The board prepares for sustainability.



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Volunteers of America

SAMPLE INDICATORS ON A GOVERNANCE STANDARD

The board prepares for sustainability

- The board completes basic and on going training
- The board executes a proper development plan
- Members have at least 80% meeting attendance
- Members participate in VOA networks



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Volunteers of America SAMPLE FINANCE STANDARDS

Monetary policy oversight is performed

- Fees are properly set
- Public funds are properly used
- Audits are free of findings
- The school demonstrates sustainability



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SAMPLE INDICATORS ON A FINANCE STANDARD

The school demonstrates sustainability

- The school has at least a 20% fund balance
- The school has a positive Current Ratio
- The school maintained or Improved Net Assets



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Volunteers of America

PUBLICATION AND USE OF REPORTS

- Schools share reports with publics
- VOA posts to Web in near future
- Newspaper articles on award winners

Boards modify policies and practices



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What questions or thoughts do you have regarding the following:

- The importance of producing annual performance reports
- The elements of strong reports
- Strategies for producing reports
- Strategies for leveraging the reports



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Peer Share

Pair with 2-3 participants and discuss notes, lessons learned, next steps for your organization and other questions that you might have.

- What other ways could the annual reports be used?
- How does an authorizer strike a balance between providing comprehensive and informative data with providing too much/overwhelming data?
- What mechanisms do you use to collect and analyze data? Do you have a cooperative relationship with the state department of education?
- Are there clear standards for which you use the annual report to assess against?
- What are your next steps?



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Questions or Comments



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Presenters Contact Information

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