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
Presenters

Mary Bradley
Central Michigan University

Carol Mehesy
Denver Public Schools

Charles Speiker
Volunteers of America—Minnesota
Central Michigan University
Annual Performance Suite of Reports

- Academic Performance Report
- Operational Performance Report
- Fiscal Performance Report
- Scorecard
Central Michigan University
Annual Performance Suite of Reports

• Driven by performance contract and expectations
• Communication mechanism for performance
• Includes demographics
• Educational tool
• Provides transparency
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)
Central Michigan University
Academic Performance Report chart example
Central Michigan University
Academic Performance Report chart example

Reading

<table>
<thead>
<tr>
<th>Grade</th>
<th>Scale Score</th>
<th>2011-2012</th>
<th>2012-2013</th>
<th>2013-2014</th>
<th>Achievement Targets</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>179</td>
<td>208</td>
<td>220</td>
<td>225</td>
<td>226</td>
</tr>
<tr>
<td>3</td>
<td>197</td>
<td>208</td>
<td>220</td>
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<td>208</td>
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<td>220</td>
<td>225</td>
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<td>5</td>
<td>219</td>
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<td>6</td>
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<tr>
<td>7</td>
<td>221</td>
<td>221</td>
<td>220</td>
<td>225</td>
<td>226</td>
</tr>
<tr>
<td>8</td>
<td>222</td>
<td>222</td>
<td>220</td>
<td>225</td>
<td>226</td>
</tr>
</tbody>
</table>

Percent of Students Meeting the Target
Enrolled for Three or More Years

- 2013-2014: 82%
  - 82% Students Met Target
  - 18% Students Did Not Meet Target

- 2012-2013: 81%
  - 81% Students Met Target
  - 19% Students Did Not Meet Target

- 2011-2012: 84%
  - 84% Students Met Target
  - 16% Students Did Not Meet Target

Fig. 11
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
Central Michigan University
Operational Performance Report chart example
Central Michigan University
Operational Performance Report chart example
Central Michigan University
Fiscal Performance Report

• Analysis of Financial Information
• Annual Financial Audit
  Management Letter Items and Responses
• Borrowings
  Short-Term and Long-Term
Central Michigan University
Fiscal Performance Report chart example
Central Michigan University
Fiscal Performance Report chart example

- Total Instructional Expenditures
  2012-2013

- Highest Cost
  Percentage

- 93% Instructional Salaries, Benefits & Services
- 0% Textbooks & Educational Media
- 3% Equipment & Furniture
- 4% Other (including Supplies & Materials)
Central Michigan University
Public Availability

All performance reports are available to the public and posted on the office’s website
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
Central Michigan University
Leveraging performance reports

• Communication of Performance
• Educational Tool
• Assists in making informed decision

Authorizer, Academy Board, Administrator
  o Field Team
    Presentation at board meetings
    Leveraged during conversations
  o On-going conversations
Denver Public Schools:
Accountability and Quality Assurance Lifecycle

- Establish Performance Expectations
  - Public (where possible)
  - Tied to charter contract
- Decide Renewal
  - Body of evidence
  - Non-renew/close low performers
- Monitor and Report
  - Academic, Financial, and Operational
  - Annual Reports
- Intervene if Necessary
  - Notice of concern
  - Interim Review
  - Required remedy plans

Body of Evidence

Annual Reports
# Denver Public Schools

## Public Accountability: Audience and Information Shared

<table>
<thead>
<tr>
<th>Audience</th>
<th>The “Why”</th>
<th>The “What”</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Public</td>
<td>• Build public will for quality schools and authorizing</td>
<td>• <strong>Academic</strong> – School Ratings published (SPF) and reported in media</td>
</tr>
<tr>
<td></td>
<td>• General transparency and public accountability</td>
<td>• <strong>Financial</strong> – financial information posted on district and school websites (Financial Transparency Act)</td>
</tr>
<tr>
<td>Parents/Guardians</td>
<td>• Inform parent choice in schools</td>
<td>• <strong>Academic</strong> – SchoolChoice Guide with school SPF ratings sent to all parents, Parent Portal</td>
</tr>
<tr>
<td></td>
<td>• Transparency and accountability</td>
<td>• <strong>Financial</strong> – financial information posted on district and school websites (Financial Transparency Act)</td>
</tr>
<tr>
<td>Charter Boards &amp; Leaders</td>
<td>• Accountability for school-specific performance</td>
<td><strong>Annual Report</strong></td>
</tr>
<tr>
<td></td>
<td>• Build governance capacity through data</td>
<td>• <strong>Academic</strong> – School overall rating (SPF), Proficiency, Growth, Equity data compared to district and similar schools</td>
</tr>
<tr>
<td></td>
<td>• Drive remedy plans</td>
<td>• <strong>Financial</strong> – Overall financial performance rating (FPF), operating margin, debt burden, revenue, liquidity, etc</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• <strong>Operational</strong> – Enrollment, compliance, governance</td>
</tr>
</tbody>
</table>
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
Denver Public Schools
Annual Report Components: Academics

School’s Overall Ratings – Three Year Snapshot

<table>
<thead>
<tr>
<th>District School Performance Framework</th>
<th>2012</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Overall</td>
<td>Growth</td>
<td>Status</td>
<td>Student Engagement</td>
<td>Post Secondary Status</td>
</tr>
<tr>
<td></td>
<td>52%</td>
<td>51%</td>
<td>33%</td>
<td>33%</td>
<td>48%</td>
</tr>
<tr>
<td></td>
<td>2013</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>49%</td>
<td>70%</td>
<td>33%</td>
<td>50%</td>
<td>18%</td>
</tr>
<tr>
<td></td>
<td>2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>45%</td>
<td>58%</td>
<td>43%</td>
<td>33%</td>
<td>14%</td>
</tr>
</tbody>
</table>
Denver Public Schools Annual Report Components: Academics

Denver Elementary School TCAP Status 13-14

- School
- District
- Similar Schools

Percent proficient 2013-14

TCAP Elementary Status: Historical

- Reading
- Math
- Writing
- Science*

*TCAP Science was replaced with CMAS Science in 2014.

*District rate calculated by ed level.
Denver Public Schools Annual Report Components: Equity

**Achievement Gap**
2013-14 TCAP Proficiency

- **Reading**
  - Minority (School): 4% 45%
  - Non-Exited ELL (School): 13% 46%
  - FRL (School): 4% 51%
  - SpEd (School): 4% 58%

- **Math**
  - Minority (School): 4% 49%
  - Non-Exited ELL (School): 17% 49%
  - FRL (School): 4% 43%
  - SpEd (School): 4% 49%

- **Writing**
  - Minority (School): 4% 33%
  - Non-Exited ELL (School): 8% 34%
  - FRL (School): 23% 42%
  - SpEd (School): 4% 52%

**English Language Learners**

**CEL/ACCESS:**
- Growth
  - School: 62%
  - District (by ed level): 58%

**Median Growth Percentile**

- 2012 (CELA): 53
- 2013 (ACCESS): 82.5
- 2014 (ACCESS): 74.5

**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.

*District rate calculated by ed level.
Denver Public Schools
Annual Report Components: Financial & Operational

### Financial

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

### Enrollment

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

![Enrollment Trends Chart]

- Non-Exited ELL
- FRL
- Minority
- SpEd
- Enrollment
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
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
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
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
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
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.
Volunteers of America
SAMPLE INDICATORS ON A GOVERNANCE STANDARD

The board prepares for sustainability
• The board completes basic and ongoing training
• The board executes a proper development plan
• Members have at least 80% meeting attendance
• Members participate in VOA networks
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
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
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
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
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?
Questions or Comments
Presenters Contact Information

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Charles Speiker
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