

# Rapid click through process to evaluate the Scorecard program for supporting performance management within Independent School Review

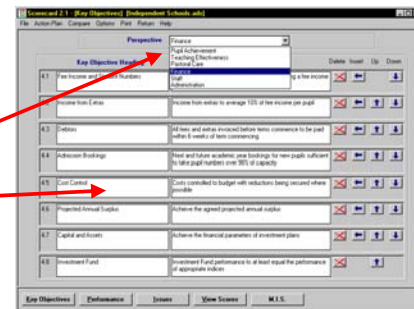
## 1. Open scorecard and an illustration file

1. **Click** the **scorecard** button on the QuickStart or quality statement working screen of the main program
2. At the scorecard QuickStart screen **click Open**
3. **Highlight** the **Illustrn scorecard school.doc** file and **click Open**



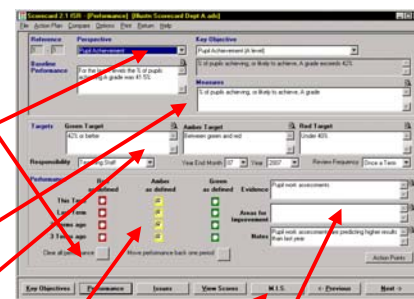
## 2. Review the features of the Objectives screen

1. The illustration file will open at the key objectives screen
2. Note the 6 perspectives (**click** to select)
3. Note the key objectives and short headings for each perspective (max 10)
4. These key objectives can be customised to those evident for your school



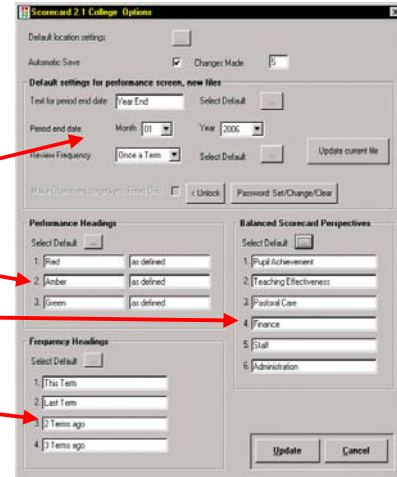
## 2. Review the features of the Performance screen

1. **Click** the **Performance** button to access the Performance screen for a key objective.
2. Note the drop down boxes to select the perspectives and key objectives (**click** to select)
3. Note the performance management details for each key objective
4. Note the 'traffic light' targets set for each key objective which can be customised for each key objective.
5. Note the feature to record 'traffic light' performance at appropriate intervals
6. Note the M.I.S. button to link the program to the school's management information system.
7. Note the feature to note evidence and areas to improve



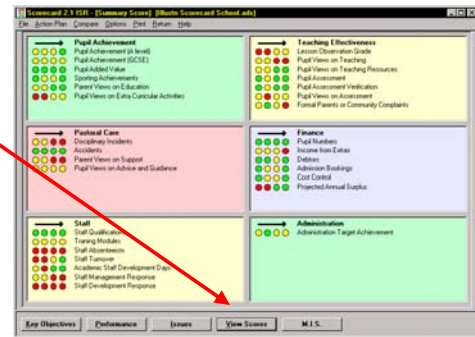
#### 4. Note the range of features that can be customised

1. **Click Options** on the top menu bar
2. Note that the following can be customised:
  - various settings on the performance screen;
  - the 3 performance headings;
  - the 6 balanced scorecard perspective headings;
  - the 4 frequency headings;



#### 5. Review Overall summary screen

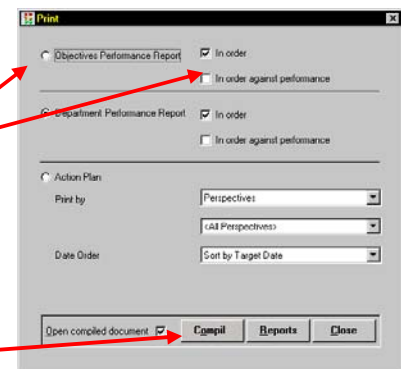
1. **Click View Scores** to access the screen that summarises overall performance over the last four periods
2. Note the performance history for the last 4 periods by key objective and perspective.
3. There is a feature to enable this screen to be printed out.



**This performance management framework can be used to compile a performance management framework for any organisation.** The scorecard program has a range of templates to help an organisation create their scorecard.

#### 6. Performance Reports

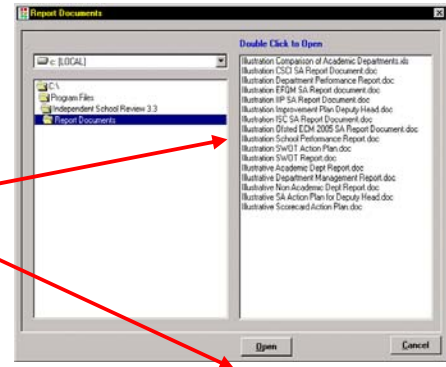
1. In addition to the overall performance management screen it is possible to print out a report to show all the detail for key objectives.
2. **Click Print** on the menu bar.
3. **Click Objectives Performance Report** and then select whether to compile the report in the stated order of the key objectives or in the order of performance (worst performing key objectives first)



4. **Click Compile** to compile the report
5. You will be asked to save the report to the Report Documents folder under a suitable file name.
6. **You cannot use this feature without a licence** but you can view a typical performance report from Report Documents.

## 7. Illustration Report Documents

1. **Click Help>Report Documents** or **Report Documents** on the Print screen to access the range of Illustration report documents
2. **Highlight Illustration School Performance Report** and **click Open**
3. There is also an **Illustration Department Performance Report.doc**



4. Note the text from the performance screen of relevant key objectives is compiled in the text boxes. This text can be edited – the documents are in this MS Word.
5. Note the space for the author to comment on the report as a whole thereby enabling the document to become a performance report for the school.



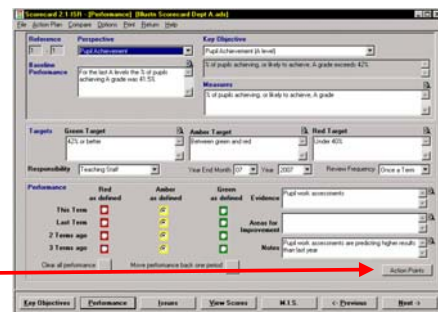
### Key Objectives - Performance Report

<b>School</b>		<b>Red</b>	Red as defined
<b>Report dated</b>	01/01/2007	<b>Amber</b>	Amber as defined
		<b>Green</b>	Green as defined
<b>Key Objective Performance Report Overview</b>			
Authors narrative comments			

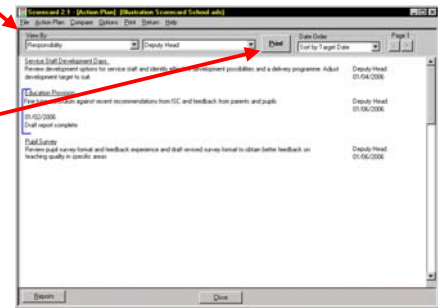
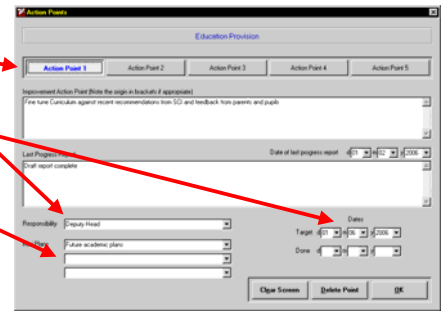
No.	Objective Measures	Targets	Baseline Performance	Responsibility	Last 3 Period Performance Evidence	Areas for Improvement Notes
5.3	<b>Staff absenteeism (excluding long term sickness) to be less than 2%</b> % of days lost to absenteeism (long term sickness excluded)	<b>Green</b> 2% or lower <b>Amber</b> Between green and red <b>Red</b> Over 3%	Consistently over 4%	Senior Management Team	<b>Red Red Red Red</b>	
5.7	<b>The % of staff believing that the school's ability to meet their personal development needs is good or better exceeds 70%</b> From staff survey returns the % of staff believing that the school's ability to meet their personal development needs is good or better	<b>Green</b> 70% or higher <b>Amber</b> Between green and red <b>Red</b> Under 65%	Last staff survey return showed 58%	Deputy Head	<b>Red Red Red Red</b>	Latest annual return is the performance for the term

## 8. Improvement Action Plans

1. Improvement action points and an action plan can be compiled for a balanced scorecard for the school as a whole or for departments.
2. **Click the Action Points** button on the Performance screen for a key objective appropriate self-evaluation software file.



- You can plan the detail for up to 5 action points for each quality statement.
- Note that responsibility and relevant dates can be added and that action points can be arranged under mini-plan headings
- Click Action Plan** on the menu bar to access the screen that shows all the action points organised by perspective, responsibility or mini plan.
- Note the features to select action points by date. **Click the text** of an action point to go to the action point screen to edit.
- To compile a selected action plan **click Compile**. You will be asked to save the action plan.
- You cannot use this feature without a licence** but you can view typical action plans from Report Documents as point 6 above.



**Responsibility - Deputy Head**

Improvement Action Point (what we plan to do)	Responsibility	Target/ Done Dates	Last Progress Report (with date)	Scorecard Ref. and Objective Heading
Analyse reasons for absenteeism as far as this is possible making allowance for 'white' lies	Deputy Head	01/02/2006	01/02/2006 Draft report prepared for executive	5.3 Staff Absenteeism
Test revised pupil survey format with group of representative pupils	Deputy Head	01/03/2006	01/02/2006 Meeting with pupils organised for 20th February 2006	3.3 Pupil Feedback
Seek out other Schools that have significantly lower rates of absenteeism	Deputy Head	01/04/2006	01/02/2006 Ways found of finding schools with low absenteeism rates	5.3 Staff Absenteeism
Review development options for service staff and identify effective development possibilities and a delivery programme. Adjust development target to suit.	Deputy Head	01/04/2006		5.6 Service Staff Development Days

## 9. Collation/ Comparison Report Outputs

- If the balanced scorecard feature is used at Department level it is possible to compare the performance of departments by **clicking Compare** on the menu bar
- You can view a comparison file by **clicking Open> Illustration Comparison of Academic Departments.doc**. This file shows the performance of each academic department in balanced scorecard terms with an average performance
- Using the Compare feature you can compile a Comparison Report which shows the comparative performance of each department in 'traffic light' terms.
- To access an illustration Comparison Report click **Help> Report Documents** to access the range of illustration report documents

5. **Highlight Illustration Comparison of Academic Departments.xls and *click Open***

6. This can be a powerful report as it shows the objectives which are causing problems with all departments as well as **comparative performance**

Scorecard for Independent School Review		Scorecard Performance Comparison					Date		
Ref	key objective short heading	Between:							
		scorecard file	Dept. Team A ads	Dept. Team B ads	Dept. Team C ads	Dept. Team D ads			
		Avg							
1.1	Pupil Achievement								
1.2	Pupil Value Added								
1.3	Cultural Achievements								
1.4	Parent Views on Education								
1.5	Pupil Views on Extra Curricular Activities								
1.6	Pupil Enjoyment Response								
2.1	Lesson Observation Grade								
2.2	Pupil Views on Teaching								
2.3	Pupil Views on Teaching Resources								
2.4	Pupil Assessment								
2.5	Pupil Assessment Verification								
2.6	Pupil Views on Assessment								
2.7	Key Skills								
2.8	Complaints								
3.1	Disciplinary Incidents								

10. Other features

This is a quick evaluation to demonstrate the main features of the *scorecard* program within *Independent School Review*.

There are numerous, but relatively minor, additional features to support these main features.

These can be viewed in the separate User Guide (pdf. format) or the Quick Tutorials (.ppt format) in the *scorecard* program or on the mini web site (<http://www.improver.co.uk/WelcometoISR.html>).