Utilizing Strategic Planning and Performance Metrics to Deliver on Continuous Improvement Efforts in Large Urban School Districts

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Utilizing Strategic Planning and Performance Metrics to Deliver on Continuous Improvement Efforts in Large Urban School Districts

Doctor of Education Leadership (Ed.L.D.)
Capstone

Submitted by
Christine C. Dahnke

To the Harvard Graduate School of Education
in partial fulfillment of the requirements for the degree of Doctor of Education Leadership.

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“I can fly higher than an eagle,
for you are the wind beneath my wings.”
-lyrics by Jeff Silbar and Larry Henley

I dedicate this capstone to my Mom, you are my hero,
And to my husband Onnie, thank you for always letting me shine.
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TABLE OF CONTENTS

Abstract 4
Introduction 5
   Residency Site 5
   Strategic Project 11
Review of Knowledge for Action 13
   Strategic Planning and Management 13
   Organizational Change 23
   Theory of Action 26
Description, Evidence and Analysis of Strategic Project 27
   Description of Strategic Project: The What and How 27
   Analysis: The Why 37
   Evidence to Date 52
Implications for Self 56
Implications for Site 61
Implications for Sector 69
Conclusion 76
Bibliography 77
Appendix 81
Abstract

Iteration on the strategic planning process increases systemic coherence, guides continuous improvements and enhances distributed accountability, thereby leading to higher performance throughout an organization. The social covenant of public school systems to provide high-quality educational opportunities for their students, and the potential impact of comprehensive strategic management, requires addressing a core question: *How can school systems more effectively utilize strategic planning and management to drive continuous improvement?* This capstone applies change management theory to explore how education systems can utilize performance metrics, scorecard structures and strategic execution to guide and manage their continuous improvement efforts. The case study for this work is Orange County Public Schools (OCPS). Located in Orlando, Florida, OCPS serves over 208,000 students and is the ninth largest school system in the United States. OCPS, like most school districts, has a strategic plan. This capstone examines the work of my strategic project which sought to address both the technical and adaptive aspects of updating an organization’s strategic plan and scorecard metrics. The goal of my strategic project was to provide a model for how to bolster continued engagement in the planning process, thereby increasing alignment and better positioning OCPS to realize their vision of becoming the top producer of successful students in the nation.
Introduction

There is an acute need for continuous improvement and strategic management. Twenty-first century education aims featuring digital literacy and personalized learning environments, together with increased competition from virtual and charter schools, have pushed traditional public school districts to reconsider their service model delivery and their aspirations for future graduates. The need for comprehensive strategic management and the social covenant of public school systems to provide high-quality educational opportunities for their students, requires addressing a core question: How can public school systems more effectively utilize strategic planning and management to drive continuous improvement? Furthermore, by digging deeper into the performance metrics, and echoing the question of Harvard Business School Professor John Kim, (2016), “can the introduction of market principles such as transparency of performance data and accountability for results at the individual and organizational level, force change on the public system and lead to higher performance?”

To answer these questions, this capstone applies change management theory to explore how education systems can use performance metrics and strategic execution to guide and manage the organization’s continuous improvement efforts.

Residency Site

Located in Orlando, Florida, Orange County Public Schools (OCPS) is the ninth largest school system in the United States and the fourth largest in Florida.
During the 2017-18 school year, OCPS served over 208,000 students across approximately 200 school locations. OCPS is a diverse school system with 41% of the student body identifying as Hispanic, 27% as White, 25% as Black and 5% as Asian. The system employs over 25,000 team members and operates a $2.1 billion annual budget. The district is also experiencing rapid growth. In 2018, OCPS opened six new schools to meet the needs of the nearly 5,000 newly enrolled students. Because of this increase, and attrition, they also welcomed 1,600 additional instructional staff members. This is not a one-year occurrence; this trend has been steady for the last five years and student growth is projected similarly into the future (OCPS Website, 2018).

OCPS is the 2014 Broad Prize for Urban Education winner and in 2015 received AdvancED district accreditation for best practices in the field of education. OCPS is governed by an eight-member school board; seven are elected from the single district which they represent, and one is elected countywide and serves as Chair. Members are elected for four-year terms. On August 28, 2018, the Board Chair and four of the seven district board seats were up for election. Teresa Jacobs, the outgoing mayor of Orange County, was elected as Chair. One board member, Linda Kobert, was reelected to her seat while the other three district seats were won by newcomers. Also, on this ballot was a four-year renewal of the one-mill property tax to support public education. This measure passed with 84 percent approval and therefore will continue to provide upwards of $166 million additional dollars annually to preserve academic programs, retain highly qualified teachers, and protect arts, athletics, and student activities.
Since 2012 when she was appointed by the Board, OCPS has been led by Superintendent Barbara M. Jenkins. Dr. Jenkins is an award-winning leader and an OCPS graduate; her roots run deep in the community. Throughout her 30-year tenure in public education, she has served in various capacities including teacher, principal, chief of staff and deputy superintendent. In 2017, she was recognized as Florida’s Superintendent of the Year and was one of four finalists for the national title. Both the Orlando Sentinel and Orlando Magazine have named her one of the 10 most powerful people in Central Florida.

Dr. Jenkins leads the district’s efforts to practice and implement continuous improvement with the current strategic plan, entitled “OCPS 2020”. This plan was developed with the support of an outside consultant during the 2014-15 school year and went live in the fall of 2015. This five-year plan outlines the district's vision, mission, values, market differentiators, goals and division priorities (see Figure 1).
Figure 1. OCPS 2002 - District Strategic Plan Map. This document, also known as the “strategy placemat” serves as a one-page document that-conveys the direction of the district’s efforts from 2015-2020.

Aligned with the strategic plan are District Scorecards. These District Scorecards are a compilation of 17 separate scorecards which outline measurable objectives and annual progress aligned to the 17 School Board selected division priorities. All 17 division priority scorecards with attached business plans, can be accessed by the public on the OCPS Website (see Appendix A). This District Scorecards serve as the basis for the Superintendent’s annual evaluation performed by the Board. The office of Research, Accountability and Grants, led by Associate Superintendent Dr. Jennifer Sasser, annually updates and manages the metrics contained in the scorecards on behalf of the divisions and the superintendent. Currently in the 2018-19 school year, OCPS has thus far collected and analyzed data for three of the five years of its current strategic plan.

In addition to the District Scorecards, OCPS utilizes two additional scorecard structures. The first structure is entitled the Extended Scorecard. These documents are also available on the district’s website and are organized by cabinet division. It outlines seven divisions within the district: (a) Teaching and Learning, (b) Operations, (c) Information Technology Services, (d) Office of Communications, (e) Fiscal Services, (f) Facilities Services, and (g) Human Resources and Executive Services. Each division’s extended scorecard lists
additional metrics and projects undertaken. It aligns these metrics to one of the
five goals listed in the district’s strategic plan.

Most divisions within OCPS also maintain their own internal scorecard that
serves as a more direct project management tool for the departments they
oversee. For example, Human Resources (HR) has division scorecard where they
measure items such as time-to-fill and employee satisfaction; the Human
Resources Leadership Team holds quarterly business reviews to share this data
with their mid-level managers. The one notable exception is the Teaching and
Learning Division. They do not have an additional division scorecard because their
district and extended scorecard metrics are aligned to state and federal
Department of Education metrics of accountability.

All three of these scorecards (a) the district scorecards, (b) the extended
scorecard and (c) the divisional/departmental scorecards align to the five
overarching district goals of (a) Intense focus on student achievement, (b) High-
performing and dedicated team, (c) Safe learning and working environment, (d)
Efficient operations and (e) Sustained community engagement.

So if OCPS boasts a five year strategic plan that extends until 2020 and a
plethora of published scorecard metrics, then why is it necessary for the
organization to engage in a novel process for strategic planning and management?

First, the context in public school systems, and in OCPS in particular, is
constantly changing. The district’s strategic plan should be responsive to these
dynamic environmental factors. OCPS in particular has experienced extraordinary
growth. In just the past three years, there has been an increase of approximately
15,000 students, 4,000 new employees, $300 million in general revenue funds, and 87,000 new one-to-one student devices. There has also been an influx of new leadership at the executive level. Of the 21 senior officials on the Superintendent’s Cabinet, only three held their current role during the development of the OCPS 2020 Strategic Plan. There is also a significant change in the School Board. Recently, as noted, in November, 2018, five of the eight board members were sworn in as new trustees.

Second, strategic management is an iterative process. For the district to continue delivering on its promise to its students, families and the community, it needs to consistently evaluate how the performance measures it tracks are improving. It also needs to systematically ensure that the measures tracked will positively impact their goals and justify the efforts and resources extended. There should be a clear and direct line from the metrics tracked in the strategic plan to the improvements of desired outcomes. While there is great transparency of metrics, the various scorecard structures are not fully aligned, and therefore are not used as a mechanism to promote organizational coherence and continuous improvement.

Finally, while there is dedicated district management of the scorecard metrics, there is also an opportunity for leadership relative to the collection of data. Reporting of scorecard metrics is different than the disciplined and consistent monitoring of the plan. Without an internal senior leader responsible for ensuring the success of the overall system, a thoughtful process of engagement with district
executive leadership has become necessary in order to implement a successful continuous improvement culture throughout the district.

Strategic execution requires consistent communication, alignment of vision, and systematic culture building. By refreshing their strategic plan, OCPS can increase the coherence of their efforts, augment support in targeted areas, and enhance the distributed accountability for achievement of their goals. In sum, iteration on the strategic planning process will create a more robust approach for continuous improvement and more effectively drive change that leads to higher performance throughout the organization.

**Strategic Project**

Therefore, seeking to answer the question of *how school systems can more effectively utilize strategic planning and management to drive continuous improvement* I led efforts within OCPS to update their current system for strategic management. Specifically, I focused my capstone project on leading and managing the evaluation and refresh of the current metrics included in the extended scorecards. As a doctoral resident, reporting directly to the Chief of Staff and with the authority to act from the Superintendent, I engaged Division Chiefs and their managers in a systematic process. I made a case for results-based performance metrics and created additional coherence in the existing outputs. Finally, I codified this year’s process so that it can become a framework for consistent analysis and annual refresh.

The anticipated outcome was for the district to possess a comprehensive, dynamic system that utilizes performance management results to drive
deliberations about support and accountability. The expectation was that this would ensure that the seven divisions within OCPS (Teaching and Learning, Operations, Information Technology Services, Office of Communications, Fiscal Services, Facilities Services, and Human Resources and Executive Services) would have a clear roadmap aligning their daily work to the district goals. The decision-making processes would then be directly linked to the district's renewed continuous improvement efforts and the ultimate goal will be achieving internal and external stakeholder buy-in on a refreshed OCPS Strategic Plan supporting the district through 2024.
Review of Knowledge for Action

Seeking to answer the question of how public school systems can more effectively utilize strategic planning to drive continuous improvement, this Review of Knowledge for Action (RKA) reviews research about strategic planning and management, change management, and possible frameworks whereby to make use of the research.

Strategic Planning and Management

A strategic plan is a roadmap that leads an organization on a path from where they are currently, to where they want to be in the future. It sets a compelling vision and translates this aspirational statement into its mission, or pithy explanation of purpose and justification for existence. Strategic plans generally include the values, or beliefs of an organization, as well as an outline of their goals, objectives and action plans. These plans are delineated in documents that establish direction, articulate priorities, guide decision-making, and at their best, drive continuous improvement. Strategic plans create a sense of purpose, focus and coherence throughout an organization. For internal stakeholders, they act as a shared blueprint supporting alignment between the organization’s vision and the employee’s daily actions. For external stakeholders, they transparently communicate the organization’s espoused mission, goals and priorities.

The process used to develop the strategic plan can vary as much as the outcomes, depending on governance structure and leadership. After the initial development of a strategic plan, an additional process must be put into place to
manage and systematically analyze both the plan itself and the performance metrics contained therein. This process is known as strategic management (Ansoff, 1979; Porter, 1981).

Strategic management, or strategic execution, is a continuous improvement process whereby an organization commits to decision making and resource allocation aligned to their strategic plan (Bossidy, Charan & Burck, 2002). It requires a continuous communication process that ensures all stakeholders are consistently aligning their work and goals to the vision and priorities of the greater system (Kaplan & Norton, 2008). These activities and ongoing analysis ensure that the strategic plan continues to be a dynamic document that guides a system toward greater coherence and aligns activities in service of the overarching organizational goals.

There are numerous frameworks and methodologies for strategic planning and management. One such example is the Plan, Do, Check, Act process or Deming Wheel, that is frequently cited in the educational context (Park, Hironaka, Carver, & Nordstrum, 2013). Other examples include the Lead-Think-Plan-Act rubric developed by the Association for Strategic Planning and the DMAIC model of Define, Measure, Analyze, Improve, Control used in Lean Six Sigma (George, 2018). The key to effectiveness of all continuous improvement processes is the iterative nature of the inquiry-based cycle and subsequent refinement based on these findings.

Gaining popularity in business since the 1960s, strategic planning is described by Mintzberg (1994) as “breaking down a goal or set of intentions into
steps, formalizing those steps so they can be implemented almost automatically, and articulating the anticipated consequences or results of each step” (p. 108). The completed plans explicitly communicate the vision, mission and values of the system to internal and external stakeholders and are used by leadership to keep all stakeholders focused on the overarching goals. Curtis and City (2009) wrote specifically about strategic planning in the context of school districts. They defined strategic planning as “an exercise of setting direction and prioritizing work that systems undertake every three to five years or with the arrival of each new superintendent” (p. 21). They urged district leaders to use the process to ask three important questions: What are we doing? Why are we doing it? And how are we doing it? (p.2).

The sequencing of these three critical questions deserves attention. Sinek (2009) suggested leaders should, “Start with Why”. He contended that leaders must support stakeholders throughout the organization to first define the purpose for engagement. If organizations take this research into account in their quest to more effectively utilize strategic planning to drive continuous improvement, it will be important to frame “the why” for each of the stakeholder groups impacted by the proposed refresh of the strategic planning process. Confirming this theory, Delprino (2013) stated:

When it comes to strategic planning, an overemphasis can be placed on getting the plan, the mission, and the vision worded just right or identifying the appropriate analytics to measure success. These are all greatly important and can be very impressive and useful. However, the bottom line
is that beneficial strategic planning, the kind that will bring about sustainable change, is about the people involved in the process. The best strategic plan is meaningless if the intended participants do not buy into the process, contribute to its development in a meaningful way, or accept the integration of the plan into their daily work lives. (p. 197)

Supporting stakeholder buy-in and encouraging authentic engagement throughout the process are critical to success. To effectively launch the project, each individual impacted will need to be able to distinctly answer for themselves why the organization is shifting how they currently engage in the strategic planning process. A skilled facilitator can grow support throughout the organization by creating and delivering effective adult development opportunities that actualize best practices including professional learning that is tailored to the audience, relevant to the daily work of those involved, and encourage authentic collaboration and sense-making. It is important to understand that change does not happen because one individual deems it so, but occurs by effective leaders bringing others along in the change process.

The goal of strategic planning and management processes should be to communicate priorities, and to produce alignment and greater coherence among the various participants and stakeholders. Fullan and Quinn explained that coherence is “a shared depth of understanding about the purpose and nature of the work in the minds and actions individually and especially collectively” (2016, p.2). They went on to say coherence is not structure, alignment, or strategy and that “there is only one way to achieve greater coherence, and that is through
purposeful action and interaction, working on capacity, clarity, precision of practice, transparency, monitoring of progress, and continuous correction” (Fullan & Quinn, 2016, p.2). The work of strategic management and execution, when done effectively, can create meaningful change for school districts. As Fullan and Quinn stated, “when large numbers of people have a deeply understood sense of what needs to be done — and see their part in achieving that purpose — coherence emerges and powerful things happen” (2016, p.1).

After there is a clear articulation of why the organization is undertaking a change in their current strategic planning process, they should seek to answer the second question offered by Curtis and City (2009, p.3): “What are we doing?”

To answer this question, research suggests beginning with a robust analysis of the current landscape (The Society for Human Resource Management [SHRM], 2012). This process can be completed systematically by conducting an environmental scan inclusive of a Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis. By engaging in this defined, structured analysis, an organization identifies its core functions and simultaneously reviews both internal conditions and comparison data of external conditions. The results of a thorough environmental scan,

should enable decision-makers to understand current and potential changes taking place ... provide strategic intelligence useful in determining organizational strategies. ... [and] foster an understanding of the effects of change on organizations, aiding in forecasting, and bringing expectations of change to bear on decision-making (Fahey & Narayanan, 1986).
Leaders should then utilize these findings to develop or iterate on organizational goals.

Goal setting, based on the results of a thorough environmental scan, is the heart of strategic planning. This aspect in and of itself is a complex process that can be most successful with application of research-based best practices. In 1954, Peter Drucker first wrote about the importance of managing for results. Today many organizations are using performance goal setting; however, not all goals are made equal. In the strategic planning process, there is an important distinction to be made between activity-based goals and outcomes or results-based goals. “With a results-driven challenge, your success or failure is clear as a bell. With an activity-based challenge it’s hard to know what if any, difference is made” (Smith & Baum, 2009, p.15).

Smith (1999) contended that “the results-driven path stakes out specific targets and matches resources, tools, and action plans to the requirements of reaching those targets” (p.30). He named four yardsticks for this data: (a) speed/time, (b) cost, (c) on specification/customer expectation of quality, and (d) positive yields. Smith (1999) suggested that impactful performance metrics combine two or more of these indicators and clearly outline both the effort required and the outcomes that will be produced (p.40).

In my own informal scan of large urban school districts’ published strategic plans, both activity-based goals and results-based goals are evident. This inconsistency is mirrored in public service organizations in the Orlando area. To remedy this, on November 15, 2018, Orlando City Commissioner Love gathered
representatives from various social services agencies and presented on Friedman's 2009 framework entitled Results Based Accountability (RBA). The goal was “to educate public and private human service professionals, providers and funders to understand basic RBA principles and concepts and identify strategies to incorporate RBA framework across various human service sectors” (Love, 2018). Multiple times during the full day presentation it was noted that there is a difference between efforts, or how hard we are trying, and effects, or impact. The presenter Dr. Nelson (2018) urged us to continue to ask “how much”, “how well” and “is anyone better off” when we develop and audit our performance metrics. To answer these questions effectively, this RBA research indicates that we must use a rate, a percent, or an index to measure our performance (Friedman, 2009).

Applying this knowledge directly to the strategic planning process, Schaffer and, Thomson (1992) called for “results driven improvement processes that focus on achieving specific, measurable operational improvements” (p. 82). The SMART goal setting tool can be used to create performance metrics in an organization’s strategic plan (Doran, 1981). This process ensures that the goal statements are specific, measurable, action oriented, realistic, and time-bound. One major benefit of the SMART goal-setting framework is ease of use. By utilizing this toolkit inclusive of environmental scanning, RBA practices and SMART goal setting, leaders of strategic planning and management can support those within the organization to put a stake in the ground. Leadership can then measure and monitor meaningful, relevant and opportune data and drive continuous improvement efforts.
After thoroughly answering the questions, “why are we shifting how we use the strategic planning process?” and “what are we currently doing and what are our future goals?” organizations must address the third question, “How are we doing it?” (Curtis & City, 2009, p.4).

The “how” of strategic planning can be interpreted to mean the articulation of the objectives, target measures, and actions that underpin the overarching organizational goals. These details will shift the strategic plan from the all too commonly developed binder collecting dust on the shelf to a robust and dynamic framework that drives decision making, resource allocation, and increases coherence throughout the organization. With a clear articulation of how an organization will reach their goals, leadership can track and measure progress and provide course correction as needed.

In order for performance metrics or objectives used in the strategic plan to guide continuous improvement, they must name measures that are concrete, time-bound, and realistic, yet compelling. Smith and Baum (2009) believed that “carefully selecting and defining the performance challenge” is key (p.14). They posited that several characteristics of appropriate performance metrics are required to have the desired impact on the organization as a whole. They listed criteria to consider including defining a measure that is critical to the organization, is reflective of the CEO’s perspective, does require a bit of risk-taking yet is also achievable. The objectives should require collaboration and instill inspiration and commitment from those involved. Critically, the challenges selected also must make sense to the organization right now. These criteria could become a checklist
that can be used to analyze and audit the goals and objectives utilized in the district scorecards and the extended scorecards of the strategic plan.

Practically, Schaffer & Thomson (1992) suggested beginning by “identifying the most urgently needed performance improvements and carving off incremental goals to achieve them quickly. By using incremental projects as testing grounds for results, management gradually creates a foundation of experience on which to build the organization-wide performance improvements” (p. 7). In the current strategic plan structure utilized by OCPS, these metrics are outlined by the extended scorecards.

For organizations that seek to utilize strategic planning as a continuous improvement process, in addition to initial plan development, they must create an ongoing and iterative system of strategic management and execution. In this context, Bossidy, Charan and Burck (2002) defined execution as a “systematic way of exposing reality and acting on it”. Kaplan and Norton (2008) authored one such system. They contended that by completing 26 sub-activities aligned to six core steps, users will achieve an “execution premium” or a measurable increase in value derived from successful strategy implementation. These steps include: (a) develop the strategy, (b) plan the strategy, (c) align the organization, (d) plan operations, (e) monitor and learn, and (f) test and adapt.

To support ongoing strategic management, effective organizations communicate the overall plan by utilizing a strategic framework. Models include the McKinsey’s Strategic Horizons, Value Disciplines approach, Stakeholder Model, and the Balanced Scorecard or the Ansoff Matrix. OCPS is currently
utilizing a variation of the Balanced Scorecard approach. According to Kaplan and Norton (1996), this approach “provides a framework for managing the implementation of strategy while also allowing the strategy itself to evolve in response to changes in the company's competitive, market and technological environment” (p.21). The Balanced Scorecard approach encompasses four processes: translating the vision, communicating and linking, business planning and feedback, and learning. The strategic learning from this approach enables the organization to make strategic decisions and pivot with agility as needed.

The processes of strategic planning and management are, at their best, iterative. They require constant communication, alignment and culture building. An organization engaging in a dynamic strategic planning process must frequently and systematically review their context, understand and interpret their data and adapt their strategies. The effective companies studied by Kaplan and Norton:

- recognize that effective strategy execution requires communicating corporate strategy; ensuring that enterprise-level plans are translated into the plans of the various units and departments; executing strategic initiatives to deliver on the grand plan; and aligning employees’ competency development plans, and their personal goals and incentives, with strategic objectives. What's more, they recognize that the company's strategy must be tested and adapted to stay abreast of the changing competition (2005, p.3)

To accomplish this lofty aim, the authors identified a key attribute of organizations successful at bridging the all too common disconnect between ambition and
performance: the establishment of “a new unit at the corporate level to oversee all strategy related activities, an office of strategy management” (Kaplan & Norton, 2005, p. 2). The main focus of this business unit is to connect strategy formation and strategy execution.

Organizational Change

Research on organizational change can also be consulted and applied to answer the question of how public school systems can more effectively utilize strategic planning to drive continuous improvement. Everyone knows the old adages that say “change is hard” and “everyone loves change until it impacts them”. These are well known because they reflect truths: managing change is complex.

Heifetz (1994) developed a change management framework that differentiates between changes that are technical and those that are adaptive. Technical challenges are those easy to identify that require change in just one or two places and can be found within the boundaries of the current organization. Creating an Office of Strategic Management where one does not exist is one example. Adaptive challenges are usually difficult to identify, require change in values, beliefs, roles, relationships, and approaches to work and require that the people with the problem do the work of solving it. Impacting the hearts and minds of those involved in shifting the organizational culture surrounding the strategic plan is an adaptive challenge. In my strategic project, I must effectively navigate both technical and adaptive changes.
A 2003 article published in the McKinsey Quarterly titled *The Psychology of Change Management* outlined the “influence model” of organizational change (Lawson & Price, 2003). This model calls for four key components, (a) role modeling, (b) fostering understanding and conviction, (c) developing talent and skills, and (d) reinforcing with formal mechanisms. Another way the authors describe these four components is simply stating that for employees to change their mindsets, they need a purpose to believe in, reinforcement systems, the skills required for change, and consistent role models. Additionally, Neilson, Martin and Powers (2008) identified four fundamental building blocks executives can use to influence actions of people within the organization: “clarifying decision rights, designing information flows, aligning motivators, and making changes to structure” (p. 1). These four elements should be attended to in the strategic plan refresh process.

Kotter (2012) highlighted the fact that many organizations have attempted change processes and failed. He claimed that these failures can be attributed to a few reasons including allowing for too much complacency, failure to create a sufficiently powerful guiding coalition or quick wins, underestimating and under communicating the vision, and neglecting to anchor the changes firmly in the corporate culture. He also offered an eight-stage process for creating major change (see Figure 2). This process outlines a step-by-step guide that can be consulted to facilitate implementation of this strategic project.
Figure 2 Kotter Eight-Step Change Process: This is a model for change management that promises to increase an organization’s chances of success.

To purposefully attend to the first three steps in this process (i.e. establishing a sense of urgency, creating a guiding coalition, and developing a vision and strategy), I will utilize the protocols of design thinking. The steps of the design thinking process include empathize, define, ideate, prototype, and test (Stanford d School Website, 2018). Using empathy interviews, designers, in this case those facilitating the strategic planning process, can better understand the current environment and therefore better position subsequent recommendations.
Furthermore, design thinking supports the development of solutions that sufficiently consider both technical and adaptive elements.

Theory of Action

Based on this data I shared a theory of action which stated that:

IF during my residency I could work with key OCPS stakeholders to:

1. Create buy-in and a guiding coalition for a refresh of the strategic plan AND
2. Support the development of additional knowledge, talent, and skills in order to refresh extended scorecard metrics AND
3. Conduct a pilot that tests and analyzes the proposed process AND THEN
4. Codify this learning into a system of continuous improvement directly linked to the strategic planning and management process

THEN OCPS would have the example of a short-term win and a model for how to bolster continued engagement in the strategic planning and management process AND

THEN this alignment would better position OCPS to realize their vision of becoming the top producer of successful students in the nation.
Description, Evidence and Analysis of Strategic Project

Description of Strategic Project: The What and How

This section describes what I intended to accomplish, the design and implementation of my strategy, how I made progress toward the goals of my strategic project, and how the work unfolded. Providing a frame for this description, I have segmented the work of my strategic project into four phases:

Phase I: Organizing to Learn
Phase II: Situating and Aligning the Strategic Project
Phase III: Defining the Problem and Developing a Theory of Action
Phase IV: Planning Strategy and Implementation

Phase I: Organizing to Learn. On June 1, 2018 I began my residency in OCPS under the supervision of Dr. Bridget Williams, who serves as Superintendent Jenkins’ Chief of Staff. Dr. Williams boasts an impressive 30-year tenure at OCPS. She is a proud OCPS graduate, previous teacher, award winning turnaround principal, and area superintendent. In addition to her more traditional Chief of Staff functions, Dr. Williams also oversees the work of Executive Services (the School Board), and the Human Resources Department (HR).

The Senior Executive Director (ED) of the HR reports to Dr. Williams. For most of the 2017-18 school year, Dr. Williams served as the departmental lead because of the unexpected and untimely passing of the previous Senior ED. In
July 2018, an external candidate assumed the role of Senior ED of Human Resources.

When I began my residency in June, Dr. Williams charged me with supporting the HRD in capturing and analyzing the department’s continuous improvement efforts. She asked me to draft the results to be included in an award application for operational excellence. This award, known as the Florida Governor’s Sterling Award for Excellence, is the highest award that a public organization in Florida can receive for performance excellence and is aligned with the Malcolm Baldrige National Quality Award. In 2015, OCPS’ HRD had first been awarded this distinction. The current award application is known as the Sterling Sustaining Award and it seeks to demonstrate continued growth and innovation since the award was first bestowed.

Dr. Williams and I agreed that by engaging in this opportunity with HR, I could quickly be recognized as a district-wide, value-adding team member. As a part of the HRD, I participated in the daily morning standing meetings where the members of the Human Resources Leadership Team (HRLT) described their tasks for the day. I observed the leadership moves of the new Senior ED and created buy-in for my strategic project by supporting various team members’ projects. Furthermore, by embedding myself within this one division directly under Dr. Williams' supervision, I developed a robust understanding of the OCPS culture.
This was critical, for as a retired OCPS administrator told me, “remember, we are an organization based on relationships” (personal communication, 2018).

As a part of the HRLT, I was able to take advantage of trainings on the Lean Six Sigma improvement process. Lean Six Sigma is a managerial concept that unites Lean processing, or the elimination of the eight kinds of muda, or waste (i.e. defects, over-production, waiting, non-utilized talent, transportation, inventory, motion and extra-processing), and the Six Sigma improvement process which seeks to identify and remove causes of defects or errors in order to minimize variability (George, 2018). In August, I obtained my Yellow Belt certification alongside 10 mid-level managers. The certification process was facilitated by an outside consultant and provided me with an additional structure to utilize design thinking protocols in service of better understanding the people who make up the organization of OCPS.

Phase II: Situating and Aligning the Strategic Project. In July 2018 at the annual OCPS Leadership Meeting, Superintendent Jenkins shared her strategic vision for the future. Her vision is to create the environment that enabling conditions of an ambidextrous organization that focuses on “adjusting and accelerating with agility” (Jenkins, personal communication, 2018). In this context, Dr. Jenkins was using ambidextrous to mean continuing to exploit or efficiently manage what is working well from the current system, while simultaneously
exploring innovation with an eye on the district’s future needs (O’Reilly & Tushman, 2004). At this meeting, she invited Vivek Wadhwa, Silicon Valley professor and author of *Driver in the Driverless Car*. Professor Wadhwa discussed the future of education from his lens as a technology entrepreneur. His presentation supported Dr. Jenkins’ vision by creating a clear sense of urgency around change.

At this annual meeting with the district’s 1,300 managers, Dr. Jenkins also shared the stage with each of the seven Division Chiefs. The Chiefs were charged with recapping the past year’s successes and sharing their divisional future priorities. Soon after this meeting, Dr. Jenkins and Dr. Williams charged me, in my role as a doctoral resident, to revisit the current strategic plan and work with the divisional leadership to refresh their scorecard metrics.

In December 2018, five new members were sworn in to the OCPS Board of Education. These new elected officials were eager to make a difference in the lives of the children of Orange County. Superintendent Jenkins contracted an outside consultant to support the new School Board to refresh the district’s vision, mission, values, goals, and market differentiators. In December, at the first meeting of the new School Board, Superintendent Jenkins shared a draft timeline for priorities in the upcoming year. She outlined how the work of my strategic project would be united with the School Board’s process. The goal is for both the work of my strategic project, which engages the internal stakeholders, and the
work of the consultant, which engages the School Board, to culminate by June 2019. At this time, Phase II of plan is being implemented. The outcome from both of these processes will be used to develop business plans and aligned strategies. The entire “renovated” strategic plan will then be revealed in December 2019 and coincide with a celebration marking 150 years of OCPS.

Phase III: Defining the Problem and Developing a Theory of Action. In order to answer my strategic question, how can public school systems more effectively utilize strategic planning and management to drive continuous improvement, I began by exploring research, theory and practice on strategic planning, performance metrics, strategic management and organizational change. I analyzed how the outcomes linked to strategic planning processes and transparency in reporting of scorecards or performance metrics impact continuous improvement.

To understand how the current strategic plan was being implemented in OCPS, I began by interviewing the executive leadership team. I also met with mid-level managers, school leadership, teachers, parents, and even high school students. Overall, I conducted over 40 empathy interviews with stakeholders at all levels of the organization. Many interviews began with the, “tell me about the last time you…” sentence frame (Stanford d School Website, 2018). This allowed me to develop a robust picture of the strengths and opportunities for improvement.
within the current strategic management system from end-users. For as Christine Ortiz, design thinking expert, and founder of Equity Meets Design, reminds us, "As designers, it's our job not to just get from users what they think they need, but to really understand where they're coming from, and sometimes uncover needs that they don't even know that they have" (HGSE CAEL Online Course Content, 2017).

I utilized the data gathered from research and these interviews to solidify a problem of practice: the district’s continuous improvement efforts are not fully aligned to the current strategic plan.

Based on this data I shared a theory of action which states that:

<table>
<thead>
<tr>
<th>IF during my residency I can work with key OCPS stakeholders to:</th>
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<tbody>
<tr>
<td>1. Create buy-in and a guiding coalition for a refresh of the strategic plan AND</td>
</tr>
<tr>
<td>2. Support the development of additional knowledge, talent, and skills in order to refresh extended scorecard metrics AND</td>
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<tr>
<td>3. Conduct a pilot that tests and analyzes the proposed process AND</td>
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<tr>
<td>4. Codify this learning into a system of continuous improvement directly linked to the strategic planning and management process,</td>
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<table>
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<tr>
<th>THEN OCPS will have the example of a short-term win and a model for how to bolster continued engagement in the strategic planning and management process AND</th>
</tr>
</thead>
<tbody>
<tr>
<td>THEN this alignment will better position OCPS to realize their vision of becoming the top producer of successful students in the nation.</td>
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</table>

Phase IV: Planning Strategy and Implementation. In August Superintendent Jenkins provided space for me, and Dr. Sasser, her Associate
Superintendent of Research, Accountability and Grants, to collaborate and present a project plan to her and her executive cabinet for feedback. At this meeting we started with “the why,” developing a vision and urgency linked to the CEOs priorities (Sinek, 2009). We noted both the significant changes in the greater educational landscape and how much OCPS has shifted since the original plan was developed in 2014. We asked members of cabinet to raise their hands if in their current role, they were part of the strategic plan development. This exercise revealed that only three of the current 21 members had participated in the original planning. From the “thumbs up” feedback received in the moment, all executive leaders were on board with my strategic project plan and timeline. The seeds were sowed for the makings of a powerful guiding coalition.

After this successful meeting, I was supported to engage the Chiefs of the seven cabinet divisions to discuss their current scorecards and overall strategy for continuous improvement. This allowed me to reiterate the opportunity that this project presented to them. I customized my messaging to ensure each individual leader could envision their department’s contribution to the success of the overall strategic project. I asked about their involvement in the development of the current plan and their vision for the future. In my initial meeting with the Chief Information Officer, he noted that with only two years on the job and a new team in place he was “excited” about the process and agreed that there was a need to “create a
streamlined process to help divisions in their improvement cycles” (personal communication, 2018). Another Chief noted that this project was important, because “[when I began in my current executive role] our prior metrics were not clear at all and our targets were more of a description than they were a metric because they would vary year to year” (personal communication, 2018). A third Chief said he “inherited” his current scorecards and therefore has limited ownership. A fourth leader shared: “The team is ready for change. We are revisiting the meaning behind the scorecards and measurable objectives. The District Scorecard should reflect strategic priorities. In the past we have been collecting data for the sake of having data and this is not a good practice. We want to remove items from district scorecards that are operational to our own tracking systems” (personal communication, 2018).

In these seven initial meetings, I also normed around the purpose of environmental scanning and using performance metrics to drive continuous improvement. The Chief Financial Officer noted that there have been new governmental accounting requirements and many legislative changes that must be attended to since the development of the current strategic plan. One of the leaders suggested, “We should have a district strategic planning calendar. This would include a coordinated timeline for an environmental scan where we looked at results from last year, [research] what is trending from legislation that might impact
strategies and conduct surveys to benchmark against other entities to revisit our plan” (personal communication, 2018). From these conversations, I concluded that my best approach would be a carefully sequenced strategy that began with a “refresh” of the performance metrics contained in the extended scorecards.

To support this goal, I created and facilitated half-day division-specific professional learning sessions for mid-level managers. To date I have completed three such trainings and engaged directors in Human Resources, Teaching and Learning and Information Technology Services. These sessions included (a) knowledge building about the purpose of strategic planning and results-based performance metrics, (b) agreement regarding effective criteria for creating and analyzing results-based performance metrics that will lead to higher performance, (C) an audit of currently public performance metrics based upon this criteria, (d) uncovering and analysis of additional internal performance metrics, and, (e) updating of public-facing data metrics. (See Appendix B for one division professional development.)

In January and February 2019, with six of the seven divisions having completed a refresh of their extended scorecard, I facilitated a share-out of these updated metrics during the weekly Chief’s meeting, an existing structure. During the meeting, each senior leader presented their thinking, process, and final changes to their colleagues. This step was included in my overall strategic project
plan in order to build buy-in, alignment and increase coherence across divisions. It supported the streamlining of measures and ensured that there was not duplication across divisions or scorecard structures. These meetings also provided the space for additional teaming, feedback, norming, and refinement of the district’s theory of action as it pertains to scorecarding in general, and specifically, led to greater coherence regarding the purpose of the extended scorecards themselves. (See Appendix C for an example of a pre/post scorecard.)

As I submit this capstone, the plan is for the division chiefs to return to their teams and to revisit their scorecards again. This iterative process was planned to increase clarity among various levels of district leadership and model the continuous articulation of strategies so that all team members are accountable. As planned, in April, the final draft scorecards would then be submitted for Cabinet approval. At the end of this process, the updated extended scorecards will become the guiding document for annual performance evaluation reviews between Dr. Jenkins and her Cabinet.
Analysis: The Why

In this section, I use the Kotter (2012) framework (described in detail in my previous *Review of Knowledge for Action*) to understand the evidence I have presented. This framework generally facilitates the analysis of each of the previously described phases of my work. It is important to note that this analysis is limited to my strategic project, which represents only one slice of the district’s overall goal to update the strategic plan. The presented evidence to date does confirm the value of this project as an important first step to achieving this broader aim.

In this section I analyze the conditions and actions that enabled me to support the Superintendent’s Cabinet to refresh their extended scorecards. It also provides an example and momentum for the strategic plan to morph into a living document that drives all continuous improvement efforts districtwide. This analysis describes the impact of my leadership on the organization and the evolution of the idea from the conception of my strategic project through the doctoral residency experience. So, why did the results occur as they did?

Create the climate for change. Kotter (2012) explained that the first phase of any organizational change is creating the climate. He breaks this down into three distinct steps: 1. Establish a Sense of Urgency, 2. Form a Powerful Guiding Coalition, and, 3. Craft a Vision. For my strategic project, I captured a similar sentiment in three phases which I entitled: Organizing to Learn, Situating and
Aligning the Strategic Project, and Defining the Problem and Developing a Theory of Action.

**Establishing a sense of urgency.** Per Kotter's (2012) advice, I first sought to make the objectives of my strategic project real and relevant. I purposefully aligned my project with a vision communicated by Superintendent Jenkins. At the 2018 Leadership Summit, Dr. Jenkins painted a compelling picture: the world is changing at a rapid pace and OCPS must change with it. She sagaciously messaged, and followed up with a #AmbidextrousDistrict tweet, that the 1,300 district leaders have an opportunity and a mandate to meet the current and future needs of the students served. I modeled the communications about my strategic project after this astute example and utilized repetition of this central message to create urgency and inspire others to move away from the status quo.

I analyzed the OCPS culture based on knowledge from previous work with large, urban school districts in Florida and in particular with the OCPS leadership team at the Public Education Leadership Program (PELP). I concluded that formal leadership, in title, role and authority is meaningful throughout the organization and necessary to move my project forward. I therefore decided that in order to establish urgency, I needed public support and legitimacy from both Superintendent Jenkins and my supervisor, Chief of Staff Williams. I was fortunate that both leaders provided me the critical sponsorship necessary to establish a project plan and launch my project. For example, they invited me to attend meetings, introduced me and my work to key stakeholders and invited me to present to Cabinet (see Appendix D for Cabinet presentation). Using this as a
springboard, I was able to leverage their public support to request meetings with Cabinet officials and have frank discussions with senior leaders about how they envisioned their teams contributing to the realization of the strategic plan refresh.

Building on this success, during the first Cabinet meeting I sold the work of my strategic project as a big opportunity. I employed leadership tactics like starting with the why, and transparently connecting my work to personal motivations of key decision makers, in order to frame the issue as critical and timely. I pushed the envelope by sharing a theory of action that included both the technical work of updating the scorecard metrics and refreshing the strategic plan, and the adaptive work of engaging with the entire executive leadership team on thinking differently about the strategic management process. I shared the results of an environmental scan to talk through strengths and weaknesses that were internal to OCPS and possible opportunities and threats that were in the greater ecosystem. For example, I shared metrics depicting the impact of student growth and how much the context in which OCPS operates has changed from when the original plan was adopted. All of these tools supported my efforts to create a sense of urgency around my strategic project.

In Kotter’s 2014 update of his original process he refines this step to state that a leader needs to “help others see the need for change through a bold, aspirational opportunity statement that communicates the importance of acting immediately” (p.27). In retrospect, my project might have been more successful if at the outset I had messaged a stronger, more succinct statement that encapsulated the reason for engaging in this work. “OCPS 2024” would have been
an easy tagline, however, I did not fully embrace its power and could have been more effective at inspiring others to engage with increased urgency.

**Forming a powerful guiding coalition.** Per Kotter, the second step in organizational change is identifying and assembling a guiding coalition (2012). Collins (2001) calls this, “getting the right people on the bus”. An important caveat is that this group of individuals must have sufficient power (in authority or influence) to lead the change effort. Therefore, by taking into account the research on influence referenced in my RKA, I spent significant time building trust and relationships. I organized informal coffees, scheduled formal conversations and attended important meeting such as those with the School Board and Cabinet. At these events I took an active learner stance and deeply listened seeking to understand each individual’s purpose for being part of the greater OCPS team. Many stated that they were a product of OCPS, or of public schools more generally and wanted to give back to the community and the system that had set them up for success. Notably, “I am a proud OCPS graduate,” was heard in more than one interview.

In one-on-one meetings, I asked directly and indirectly about individuals’ desire to see organizational change driven by the strategic plan refresh. One leader told me directly, “there’s been so much change since this plan was originally developed ... the team is ready to change the strategic plan” (personal communication, 2018). Another expressed a desire to put their “fingerprint” on the overall division metrics (personal communication, 2018). A third shared that she had spoken with other division managers and “there was a consensus from the
department leaders that documentation is redundant and difficult to complete” (personal communication, 2018). She asked if I could “make the process easier to move through, provide a timeline for the district and create a more efficient, less time consuming documentation process” (personal communication, 2018).

All of my requests to participate in meetings and conversations were granted and prove that many of the leadership tactics I utilized to build relationships were effective. The Chief of Staff met with me on a weekly basis and acted as a rudder, guiding me as I tested ideas for implementation. She would frequently add historical background information to my incomplete analysis of current events. The Associate Superintendent for Research, Accountability and Grants supported the framing of my project, the definition of the problem and helped me to “right size” the scope for my residency. All of this feedback informed my decision to change the goal of my original strategic project to the more appropriate and influential project that I undertook.

Evidence confirms that I correctly identified and effectively engaged a diverse group of stakeholders. I initially believed the “right” people for the guiding coalition were those on the Superintendent’s Cabinet. This understanding evolved from reflecting on data collected while interviewing the Chiefs. I came to understand that while yes, the divisional leader did need to be on board, in many cases there were individuals within the divisions that had the knowledge, skills and desire to work more deeply on the solution. These employees ranged in title from business analyst, to senior director, to even a consultant who had the ear and respect of their Chief. Evidence also confirms that I effectively engaged the
department currently responsible for the annual update of the plan. Rather than being seen as a threat or creating duplicitous outcomes, through careful analysis of empathy interviews I was able to situate my project so that it authentically added value to the important work already being done. As my project progressed, I organized frequent check-ins to share, ideate, and refine. Because of this powerful guiding coalition I was able to elevate the work and build coherence throughout the organization. One Chief said, “thank you for the work you’re doing. This is important to our organization and elevating conversations that we should be having more frequently” (personal communication, 2018).

In retrospect, while I was able to identify and assemble the Superintendent’s Cabinet, other volunteers throughout the organization, and the office currently managing the scorecards, I missed an opportunity to convene all of these diverse non job-alike team members together as one guiding coalition. Perhaps if I would have worked with the Assistant Director of Research, Accountability and Grants to call a meeting earlier in the process, I would have more speedily diagnosed the culture and created a stronger statement of the Big Opportunity that this project presented.

**Crafting a vision.** Per Kotter (2012), I next worked to fine-tune my strategic project and place it squarely in Superintendent Jenkins’ greater vision for the future of the district. It was important to frequently message that my work built on past success and be timely in the ever-changing context that is typical of public school districts. Based on data captured in informational meetings, I began to craft a vision that became my problem of practice and evolved into a theory of action. I
outlined my project plan and timeline, taking into account the school year calendar and my personal residency timeline. I shared my plan widely and revisited the timeline in each meeting that I facilitated. This leadership tactic ensured that stakeholders had multiple opportunities to hear, digest and provide feedback related to the purpose, goals and timeline for completion.

To “get the vision right,” Kotter (2012) recommended starting with a deep analysis of the existing methods, processes, hierarchical structure, goals and objectives, and use of technology and people within the organization. From my analysis, I uncovered general consensus that an updated system is needed. One interviewee said, “our job [as senior executives] is to analyze the data and make decisions based on the data. The job should not be to collect the data. We should be using it to make determinations about what to do with the resources we have” (personal communication, 2018). A Cabinet official lamented, “I wish we could stop reporting on measures that aren’t strategic” (personal communication, 2018). Another senior manager shared that because he is new to his role, and inherited the current scorecard metrics, it was “hard to understand the targets and how they were set” (personal communication, 2018). One Chief shared, “we’re collecting a lot of data and working very hard but we’re not seeing the changes we desire” (personal communication, 2018).

From my subsequent analysis I concluded that the district’s continuous improvement efforts were not fully aligned to the strategic plan and its current scorecard structures. This then became my problem of practice. I effectively situated the problem of practice and theory of action that underpinned my strategic
project by sharing my analysis of the current scorecards and seeking feedback on what various stakeholders wanted to see change. “You don’t need a large list … you want to make sure that you aren’t just checking boxes. We should ask what is going to help improve our outcomes,” opined on Cabinet official (personal communication, 2018). In order to build coherence and elevate the issue, I mirrored back the evidence I had collected regarding consensus that the current structure of reporting scorecard metrics and many of the metrics themselves were outdated and ineffective at driving change. I shared these findings formally in August via my EdLD Progress Memo and received feedback that the overall vision for the work conveyed a deep understanding of the current reality. I juxtaposed where the district was in terms of strategic planning and management with the future possibilities that could be realized by engaging in this project and worked to build coherence through engagement with internal stakeholders by repeatedly framing “the why”. This contributed to the necessary sense-making, issue-framing and issue-selling of the Superintendent’s vision and the work of my strategic project.

Engage and Enable the Whole Organization. Kotter (2012) outlined that the second phase of any organizational change is engaging and enabling the whole organization. He breaks this down into three distinct steps: 1. Communicate for Buy In, 2. Empower Action, and 3. Create Short-term Wins. For my strategic project, I captured a similar sentiment which I entitled: Planning Strategy and Implementation.
Communicate for buy-in. In this step, Kotter advised leaders to involve as many people as possible or “enlist a volunteer army” (p. 31). He adds that it is important to communicate the essentials simply and to appeal and respond to people’s needs. I differentiated my messaging to appeal to the widest range of internal stakeholders. For example, some team members were moved to action by their understanding of the rapid pace of growth in the district. Others were motivated by the connection of the scorecard metrics to their evaluations. Most felt compelled to meet the vision and expectations of their leaders. Furthermore, my analysis uncovered that three of the current 21 senior officials sitting on the Superintendent’s Cabinet held their current role during the development of the current OCPS 2020 plan and most sought a forum to update the plan and include their input, insight and expertise. Wisely, one Chief noted, “having bad data is worse than having no data” and now was a great time to make a change (personal communication, 2018). This was a win-win for the Superintendent and the senior leadership team.

Depending on which division and leader I spoke to I customized my messaging to respond to their individual or departmental needs. For example, based on results from initial conversations with each executive leader, the philosophy and purpose of the extended scorecards varied among divisions. Some used it as “deliberate practice” and updated the metrics annually. Others used it to report on the five-year metrics included in the District Scorecards. Some divisions repeated metrics on more than one scorecard structure and created alignment between the District Scorecard and the Extended Scorecards and others
did not. I used this knowledge to personalize the process inclusive of content and scope for each division. This was effective and created strong buy-in that was evident in the collaboration meeting among Chiefs.

Because Superintendent Jenkins invited me to present the project plan at Cabinet, I had buy-in from senior leaders who publicly placed their stamp of approval on the process plan with a “thumbs up”. These executives then became key in helping me to broaden my reach and enlist my “volunteer army” by connected me with the individuals within their organizational units that were already thinking about how to utilize the existing scorecards differently. These conversations led to the organization of a loose coalition of non-job alike individuals throughout the organization. In all of my messaging, I strategically reminded OCPS employees that we were helping to realize the greater vision of Superintendent Jenkins and used her quote to “adjust and adapt with agility” on my presentation PowerPoints.

Empower action. In step five, Kotter (2012) asked leaders to remove obstacles, enable constructive feedback, and garner lots of support from leaders by rewarding and recognizing progress and achievements. I took this recommendation into account as I formulated my project plan and included frequent check-ins with the formal leadership team of the district.

I empowered each divisional leadership team by providing them the research and best practices from my RKA. With their support, I facilitated a customized problem solving, inquiry-based process with their teams. I helped each team to examine the current metrics and to define new metrics that were
increasing aligned to the current work of their teams. For example, the Teaching and Learning Division wanted to remove goals aligned to a survey that is no longer used in the district and add goals for meeting the safe schools requirement of the recent Marjory Stoneman Douglas Act. The Operations Division wanted to remove an old measure that was operational (not strategic) in nature and modify language of another to capture more useful data. The Information Technology Services Division sought to update most of their metrics and align their scorecard to the KPIs tracked by the Council of Great City Schools.

After each division updated their Extended Scorecards, I facilitated a feedback loop where in person, during a closed-door Chief’s meeting, the Superintendent’s Cabinet shared their updates with each other. Prior to the meeting I supported each executive leader to prepare to present their updated scorecards and receive feedback. I was purposeful in the sequencing of the share-out and in the first of three groups I included one individual who was excited to share about the process as much as the product. This meeting and discussion were a critical turning point in my strategic project. The conversation quickly evolved to reveal that there was disagreement and variability in thought regarding the purpose of the extended scorecards. One “ah-ha moment” came when a Chief reflected on the annual recurring nature of the Extended Scorecard: “so the extended scorecard is more like a report card, and not like a transcript” (personal communication, 2019). When it was clear that everyone’s voices were heard and the team looked for guidance, I was prepared and shared a visual outlining three different options for updating the format of the extended scorecard. This visual
provided opportunity for each leader to express their divisions’ priorities, and their desire for a change. It focused the team on solutions and commonalities. After the first two meetings, the chiefs decided to return to their teams with the proposed solutions and continue to ideate. In late March, we plan to reconvene.

During this meeting most leaders expressed comments that demonstrated their thinking was evolving. One leadership tactic that supported success was not having all the answers or coming with a fully cooked solution. It was important to allow for the open discussion and sense-making to occur. This was a strategic move that allowed the leadership team to solve the problem on their own. Kotter (2012) told us to give leaders the problems, not solutions and to engage in participatory decision making about how to fit this work into the larger vision of a refresh of the plan. In the end, while there was variation in the amount of time it took some to unfreeze or unlearn the old way of engaging with the Extended Scorecards, most members of the team made significant changes to not only the outward metrics but also to their mindset around gathering the data in the first place.

Generate short-term wins. Kotter (2012) recommended generating short-term wins by setting aims that are easy to achieve and manageable. Originally, I sought to support district leaders to update the entire strategic plan. I had thought that this technical solution would be effective at developing the knowledge, talent and skills of leadership and therefore would lead to better alignment of the district’s continuous improvement efforts to their strategic plan. However, two key factors shifted my thinking. First, in my initial analysis I discovered that there were more
than 50 metrics included in the 17 district scorecard and there were more than 50 metrics included in the seven division scorecards. Uncovering this reality, rethinking the feasibility of the residency goals and ten-month timeline, and utilizing Kotter’s (2012) recommendation to empower change by starting with a “quick win”, I adjusted the scope of my project. I concluded that rather than focus broadly on more than 100 currently tracked metrics across various scorecards, I determined a more effective strategy would be to support the update of just the extended scorecards.

This decision was confirmed by the change in the governance. In November five new School Board members were elected and this required a reexamination of strategy. The new School Board was an important stakeholder that needed to be authentically engaged in the overall strategic plan refresh. In December, the new School Board was sworn in, and Superintendent Jenkins set a reasonable timeline for a larger “renovation” of the entire plan. The calendar included the outcome of my strategic project as the first piece, then the “renovation of the vision, mission, values, market differentiators and goals by the school board supported by an outside consultant. Following this “above the line” work, the renovated strategic plan will be returned again to the divisions for them to align strategies and complete business plans that outline their future work (Jenkins, personal communication, 2018).

There was also a tension to navigate between my desire to create a short-term win and at the same time to realize the long-term vision of creating a culture shift in the way that the strategic planning process and scorecard metric reporting
occurred. At first, my project was formulated to update the entire strategic plan that would guide the district’s work through 2021. As the year progressed, there were personnel changes, a frequent occurrence in school districts, and something that needed to be attended to in the process. More data were collected as my project took shape and a need was revealed to adjust the timeline and extend the process. Currently the goal is to spend 2019 in the planning phases and publish a reconstructed plan in December 2019 that will guide the district’s efforts through 2024. This process uncovered that “going slow to go fast” and more effectively attending to the adaptive and technical aspects of the process are important considerations for long term success.

Notably, my strategic project became the first step of many initiatives linked to the overall vision of more effectively utilizing the strategic planning and management processes to drive continuous improvement throughout OCPS. I believe that my success was in part due to the “right sizing” of my project. In essence, my strategic project became a short-term win. The greater desire of aligning the district’s continuous improvement efforts to the strategic plan, could not occur during the timeline of my residency because systems coherence and alignment are long-term outcomes that are the result of continuous engagement over time.

Kotter’s final advice in this stage is to plan for visible performance improvements (2012). Taking this research into account, I have begun to develop a new look and format for the extended scorecards. This will visibly signal a
change to all, and recognize and reward those employees involved in the improvements realized during implementation of my strategic project.

**Implementing and Sustaining Change.** The final phase of organizational change, according to Kotter (2012) is implementing and sustaining change. He breaks this down into two distinct steps: (a) Don't let up, and (b) Make it stick. These steps will be used to guide my implications for site, sector and self in the eponymously titled sections to come.
Evidence to Date

This capstone serves as an attempt to articulate what has been accomplished to date and to suggest strategic actions going forward. Through implementation of my strategic project I have been able to “get the flywheel moving for energy, credibility and momentum” (Smith & Baum, 2009, p. 4). In order to better understand how public school systems can more effectively utilize strategic planning and management to drive continuous improvement, I utilized the following project plan (see Figure 3).

<table>
<thead>
<tr>
<th>Strategic Plan Refresh Project Plan</th>
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<tbody>
<tr>
<td>Presentation to Cabinet for Feedback</td>
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<tr>
<td>One on One Listening Meetings with Division Chiefs</td>
</tr>
<tr>
<td>Produce and Share Project Plan for Feedback</td>
</tr>
<tr>
<td>Facilitated Meetings with Departments: Review Current Strategic Plan, Root Cause Analysis, Development of New Measures for OCPS 2021</td>
</tr>
<tr>
<td>Collaborative Team Share at Chiefs Meeting (Cross Dept Feedback Session)</td>
</tr>
<tr>
<td>Facilitated Meeting with Departments: Feedback Session on Final Draft</td>
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<td>Presentation to Cabinet</td>
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Figure 3 Strategic Plan Refresh Project Plan: This plan reflects my initial thinking regarding scope and timeline for my strategic project.

For this capstone, I collected evidence throughout my residency that supports my analysis. Figure 4 captures this evidence to date and includes both outputs and outcomes of the work. I use outputs to refer to evidence that demonstrate I did what I set out to do. These are captured in the “if” statements of
my theory of action. I use outcomes to refer to the evidence related to the changes that resulted from those actions. These are the artifacts of the “then” portion of my theory of action. This analysis serves to summarize the success rate and major results of my theory of action.

<table>
<thead>
<tr>
<th>Theory of Action “IF” Statements</th>
<th>Progress to Date</th>
<th>Major Results</th>
</tr>
</thead>
</table>
| Create buy-in and a guiding coalition for a refresh of the strategic plan | ![Progress Bar] | ● Researched and shared best practices from literature and the field  
● Conducted and analyzed informational interviews with cabinet members  
● Conducted and analyzed over 50 stakeholder interviews  
● Presented and facilitated discussions to better understand and norm on purpose of strategic plan and scorecards |
| Support the development of additional knowledge, talent and skills in order to refresh extended scorecard metrics | ![Progress Bar] | ● Conducted and shared analysis of current strategic plan and scorecard structures  
● Presented and facilitated discussions with leadership teams of various divisions to build knowledge and skills related to actionable scorecard metrics  
● Developed internal stakeholder agreement that change is needed and buy-in from Cabinet leadership on process and timeline  
● Facilitated 10 Cabinet level department meetings to update District Scorecard metrics and align Division Scorecards to district goals  
● Facilitated dialog between executive leaders to build coherence and uniformity in reporting across scorecards |
| Conduct a pilot that tests and analyzes the proposed process | ![Progress Bar] | ● Embedded within HR to deeply understand the team culture, history and performance metrics  
● Submission of Sterling Award application documenting HR’s continuous improvement efforts  
● Supported update of district and Extended Scorecard metrics for Fiscal Services, Facilities Services, Operations, Office of Communications, Teaching and Learning, Human Resources and Executive Services and Information Technology Services |
Codify this learning into a system of continuous improvement directly linked to the strategic planning and management process

- Provided recommendations in real time for in-process improvements
- Drafted and shared implications for site, included in capstone
- Aligned vision of Superintendent with ongoing continuous improvement processes

### Theory of Action “Then” Statements

| OCPS will have the example of a short-term win and a model for how to bolster continued engagement in the strategic planning and management process AND THEN this alignment will better position OCPS to realize their vision of becoming the top producer of successful students in the nation |

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### Phases

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| Organizing to Learn |  + Successfully embedded within HR Leadership Team; deeply understand the team culture, history and performance metrics; actively collaborate in meetings and on projects.  
+ Various team members requested my support with individual projects, for example measuring historical outcomes of Management Leadership Academy  
+ Collaborated with senior leaders to capture and analyze divisional continuous improvement efforts and supported submission of Florida Governor Sterling Award for Excellence nomination  
+ HRLT actively engaged in collaborative learning session on continuous improvement  
- Follow-up steps formulated were slow to be realized and needed formal leaderships directive to advance |

+ = evidence of actions making progress toward TOA outcomes  
- = evidence that actions were not making progress  
0 = what didn’t happen
| Situate and Align the Strategic Project | + Cabinet provided “thumbs up” feedback demonstrating agreement with project scope and timeline  
+ Internal stakeholder agreement that change is needed and buy-in from Cabinet leadership on process and timeline  
+ The work of my strategic project was included in 2019 Planning Calendar for the new School Board  
+ Feedback from senior leadership on opportunity to engage in strategic plan refresh was overwhelmingly positive |
| Define the problem of practice and develop a theory of action | + Six executive leaders actively engaged in empathy interviews, to share historical knowledge of strategic planning process and review current metrics  
+ Three executive leaders requested professional learning for their senior managers on constructing results-based performance metrics |
| Plan strategy and implementation | + Continuous support and alignment conversations with the Office of Research, Accountability and Grants, who currently manage the process  
+ Requested School Board session on historical context of strategic planning and deep dive into current metrics captured by Teaching and Learning  
+ Productive dialog building coherence among Cabinet-level officials  
+ Formal feedback from meetings and professional learning sessions indicated participant satisfaction  
+ Internal stakeholder agreement and articulation of Extended Scorecard metrics  
+ Stakeholder input is currently being solicited  
+ Extended scorecards have been updated  
+ Productive tension exists between using strategic plan scorecards to show operational improvements or strategic improvements  
+ Currently consideration is being made of updating Extended Scorecard format to more accurately capture purpose of annual continuous improvement metrics  
- Formal environmental scanning only occurred in some divisions - Scorecards contain both results-based metrics and activity-based metrics 0 - Clearly documented processes for OCPS to annually review scorecard metrics and update Strategic Plan as needed 0 - Articulation of lessons learned that can be used next year in accreditation process 0 - External communication of OCPS 2024 scorecard metrics |

*Figure 4 Evidence of Progress toward Outputs and Outcomes*
Implications for Self

*If I am not for myself, who will be for me?*
*When I am for myself alone, what am I?*
*if not now, when?*

Rabbi Hillel

Working to achieve the goals of this strategic project solidified in my mind the power of sharing an effective public narrative. Harvard Kennedy School Professor Marshall Ganz tell us that:

Public narrative is the leadership practice of translating values into action. To lead is to accept responsibility for enabling others to achieve shared purpose in the face of uncertainty. Public narrative is a discursive process through which individuals, communities, and nations learn to make choices, construct identity, and inspire action...We can use public narrative to link our own calling to that of our community to a call to action. It is learning how to tell a story of self, a story of us, and a story of now. Because it engages the "head" and the "heart" narrative can instruct and inspire - teaching us not only why we should act, but moving us to act.” ([Harvard Kennedy School Website](http://www.hks.harvard.edu), 2019)

My desire is to realize educational equity for all students, and as a leader, I accept my responsibility for enabling others to achieve this goal. I believe that I can best inspire action by transparently sharing my purpose for doing this work, seeking to better understand the motivations of others, and then anchoring both in a bold vision for change.

Like all human beings, I possess a multitude of identities, and the two that have remained the most salient in my adult life are those of educator and
Floridian. My doctoral residency with OCPS allowed me to pivot from a professional experience firmly planted in teaching and learning, to one centered on executive leadership. While this transition was uncomfortable at times, this opportunity provided me with the necessary lessons to learn and grow.

In *The Leadership Pipeline*, Charan, Drotter and Noel (2011) described an “internal architecture for growing leaders” that exists within all organizations (p. viii). They posited that there are six distinct passages and that each “represents a major change in job requirements that translates to new skill requirements, new time horizons and applications, and new work values” (p.8). This residency experience enabled me to acquire new capabilities. It also encouraged me to reflect on what leadership practices I value most. It compelled me to shift my focus and efforts in order to become a more strategic executive leader. For me, this involved grappling with a sense of loss; a sense of detachment. As a teacher, coach and district-level executive director, it was relatively easy to feel the immediate impact of my daily work. As I deepened my understanding of the complexity of this new role, I began to let go and “unlearn” tactics that had made me previously successful. I could not “run the business” as it were, rather I needed to “value the success of other people and their businesses” (p.123).

Having the opportunity to practice asserting my opinion, influencing others to change their practices and beliefs, and leading the development of a shared sense of urgency around a big opportunity, helped me to grow. I now understand that to inspire action it is necessary to share a “bold, aspirational opportunity statement” (Kotter, 2012). This puts a stake in the ground, and encourages
action. It supports individuals to organize and become a collective. Armed with the right messaging, a leader can transform a group into a team and as the adage says, “have greater impact than the sum of its parts.” To effectively lead organizational change, I need to continue to reach outside of my comfort zone, take on new challenges, and rely on my strengths of effective communication and impactful collaboration.

Looking forward, I vow to practice gratitude, and share the joy I derive from doing the work. I believe that public schools systems are a critical lever in helping all children achieve their infinite potential. The work can be hard and hours might be long, but along the way, I will make time to celebrate success. I will continue to formally and informally recognize those throughout the organization, whose persistence and achievements led the way. For as Isaac Newton famously stated, “If I have seen further, it is by standing upon the shoulders of giants”.

In this spirit, I commit to passing on this learning by mentoring others. There are shifting capabilities, time frames and values as one transitions from roles where you are leading oneself, to those where you are leading others, and from roles where one is leading leaders, to those where one is charged with leading the strategy (Charan, Drotter & Noel, 2011). There can be a sense of loss, but the potential for impact is great. I will openly share this leadership reality as I empower others’ growth and development along the pipeline.

Through implementation of this strategic project, I have learned to “go slow to go fast”. I have an innate bias toward action, and this will need to be balanced with purposeful planning, and focused reflection. My residency would not have
been as successful as it was if I did not purposefully build in opportunities to listen, learn and reflect. As my executive coach Robert Goodman advised, “become a cultural anthropologist” (personal communications, 2018). Because I actively engaged in this new style of work, I now have the muscle-memory and blueprint for effectively using empathy interviews in order to uncover norms, strengths and pain-points. This practice helped me to highlight quantitative and qualitative data in order to craft a convincing argument for the ongoing work of my strategic project.

My previous experiences as an educator took me from Spain to Washington D.C., and from Miami to Jacksonville. In each new environment I gained knowledge, skills and confidence in my ability to create and facilitate learning experiences that would result in change. Time and again, in each new location, I worked to move from outsider status to a respected, contributing member of the community. During my residency, I once again have navigated this transition. I did so by highlighting my commitment to lifelong learning, and voicing my commitment to public service. I built a “story of us” by asking purposeful questions, expressing curiosity, and seeking to better understand the rich history of the individuals and the collective organization. I actively engaged in authentic collaborative learning with colleagues, and frequently sought feedback from those with different perspectives.

To build an effective “story of now,” I positioned my work within the greater vision of the Superintendent. Demonstrating my eagerness to contribute to the overall goals of the district enabled me to develop trust, and the buy-in necessary to achieve the aims of my project. I spent significant time considering the
organization’s overall strategy, reflecting on progress to date, and carefully sequencing next steps, while taking into consideration various stakeholder perspectives. I read the local newspaper, attended the board meetings, and readjusted my scope and timeline as necessary. Every chance I got I was selling my strategic project. In formal meetings and one-on-one conversations, I was constantly communicating the vision for refreshing the strategic plan, and for developing process coherence. Through this continuous pressure testing of my theory of action with the key stakeholders, I was able, through fits and starts and ups and downs, to accomplish some technical and some adaptive change elements (Heifetz, 1994). In my future leadership, I plan to use the personal narrative structure in order to create a sense of urgency, and collective empowerment. By continuing to reference this framework, I will create the necessary conditions to lead long-term significant change efforts on behalf of children and families.
Implications for Site

OCPS has begun to renovate their strategic plan, and to envision what success will look like over the next five years. They have involved their new School Board, and have begun the environmental scanning that will lead to the identification of successes, and areas for improvement. By leading the Superintendent’s Cabinet to update their extended scorecards, a seemingly technical fix, I was able to till the soil, and begin to shift the mindset of the organization regarding strategic planning and management. Smith and Baum (2009) advised that in any transformation process, “the transition points are critical” and this capstone marks, as he names it, the “end of the beginning” stage of change (p.18). As my doctoral residency concludes, I share the following implications with the organization as they enter the next phase of the work.

Don’t Let Up. As Kotter (2012) succinctly stated, “don’t let up”. To do so, he recommended creating a climate of ongoing evolution. OCPS can leverage the outcomes of my project, and affirm to internal stakeholders that this strategic plan renovation offers a transformational opportunity. The work of my strategic project impacted the internal conditions of the organization and leadership must confirm that there is value created in refining the strategic planning and management process in addition to updating the document. OCPS must message that greater systems coherence will drive continued success. Overtly connecting the upcoming work, to the knowledge and skills gained by those who participated in updating their Extended Scorecards, will ensure that next steps are built upon this previously developed schema. Rather than declaring victory prematurely, Kotter (2012)
recommended leaders should foster and encourage determination and persistence.

I recommend that OCPS begin the next phase of this work by clearly communicating the expectations (Kotter, 2012). Granted, there are two simultaneous processes occurring: one engaging the School Board and one engaging internal OCPS leaders. Both processes must be carefully managed, and led. In terms of communicating expectations to the Board, OCPS is well on its way. The Superintendent has outlined calendar dates for formal work sessions where OCPS staff will present School Board members with an overview of the district’s progress to date on their current strategic plan and scorecards. The School Board will be guided through a situational analysis which will support them to define strengths, weaknesses, opportunities and threats. Through facilitated discussion, these ideas will develop into refinements to the vision, mission, values, market differentiators and overarching priorities. This is being touted as the “above the line” work (Jenkins, personal communication, 2019).

The School Board process will conclude in June 2019. The outcomes of this work will then be shared internally so that staff can develop strategies, business plans and performance metrics outlining the “below the line” work (Jenkins, personal communications, 2019). I assert that this handoff is critical. Here I can recommend a few quick wins. I recommend OCPS provide clear expectations for the new submissions. I would require all tracked metrics reflect results-based goals, and utilize the SMART goal-setting framework as a stated criterion. I would also require benchmarking of targets versus industry and
competitive standards. I recommend using the Key Performance Indicators (KPIs) and Academic Return on Investment (A-ROI) metrics published by the Council of Great City Schools as the starting point. With these technical changes to the structure, the new business plans and scorecards are more apt to be used to support effective decision making. Because setting strategy is as much about sharing what you are doing, as naming what you are not, I also recommend reducing the number of priorities. Currently, there are 17 division priorities that implicate more than 60 indicators. This expansive number of measures diminishes the potential of the strategic plan to provide a north star for the work of the district.

**Make It Stick.** In the final step, Kotter (2012) advised leaders to “make [the changes] stick”. To achieve sustained improvements, Kotter argued that leaders should use the increased credibility obtained from their quick wins to change systems, structures and policies that don't fit the vision. He named that this can be done by “hiring, promoting, and developing employees who can implement the vision and well as continuously reinvigorating the process with new projects, themes and change agents” (p. 65). I believe that OCPS does have the right people on the Superintendent’s Cabinet to make this refresh of the strategic plan impactful and increasingly aligned to the district’s continuous improvement efforts. Furthermore, I do believe that by engaging the School Board early and often in the process, the Superintendent is creating the conditions for the executive leadership team to drive the work of “leading our students to success with the support and involvement of families and the community” (OCPS Strategic Plan, 2014). I do
recommend formalizing and supporting systems and structures that communicate
the iterative nature of strategic management.

OCPS has invested people, time, effort and money into a strategic management system that I argue, leaves value on the table. The current organizational structure attends to the technical aspects of naming priorities, collecting metrics and displaying scorecards. However, current structures do not yet exist to lead the adaptive work of supporting the leadership team to develop, guide and monitor continuous improvement efforts aligned to the strategic plan. While competent, detail-oriented and efficient, the Office of Research, Accountability and Grants as it is currently structured cannot successfully take on these improvements. The department is built to achieve technical successes. Like the work of my strategic project, this upcoming phase involves problem solving for both technical and adaptive challenges (Heifetz, 1994). It will be as much about convincing people within the organization to use the strategic plan differently than it is about compliance. This is a cultural shift and requires time, talent and aligned resources focused on the adaptive challenge. By staying the course and working the plan, more and more stakeholders will become engaged and a “volunteer army” will grow in ranks (Kotter, 2012).

There has been productive discomfort and stated excitement created by the challenging of existing mindsets regarding continuous improvement and strategic management. Use this spark to carry the work forward. I encourage OCPS to put a stake in the ground as an organization that values and utilizes the strategic planning process to drive continuous improvement. This is a calculated risk. It
involves honest evaluation of current actions, a shared commitment to data-driven decision making, the de-stigmatization of change, increased alignment of resources and the building of capacity. These actions will undoubtedly create cognitive dissonance that will need to be attended to (Heifetz, 1994). Heifetz et al. argued that by establishing a “holding environment”, people can be productively led through adaptive change (Heifetz, Grashow, & Linsky, 2009). This structure “binds people together and enables them to maintain their collective focus on what they are trying to do” (p. 155). Creating a holding environment will support OCPS to adapt existing structures and elevate conversations about coherence, alignment and continuous improvement.

To this end, and aligned to the research of Kaplan and Norton (2005), I recommend developing, resourcing and supporting a separate office of strategy management with “direct access to the CEO” (p.6). Kaplan and Norton (2005) posited a precise job description inclusive of establishing a uniform measurement system and overseeing the data collection, and also leading the adaptive process of influencing others to transform the use of the strategic plan. Setting up this office and hiring the right person to lead this work will be a key step toward ensuring that the district’s continuous improvement systems are iterative, consistently evaluated and produce results. The theory of ambidexterity tells us that divergent thinking is required for transformation, and for innovation to succeed, there must be separation between the old way of doing things and the new way (O’Reilly & Tushman, 2004). This also reflects Kotter’s updated theory on change management which states that the old hierarchical way of organizing will not solve
the problems of the future (2014). Because the current system of strategic management values compliance, there is an opportunity cost. What projects are not started because resources are expended? What projects continue to be undertaken that are not positively impacting our goals? I believe that with minimal upfront investment, OCPS can “change the system, structures and policies” and be better positioned for future success (Kotter, 2012).

One investment I would recommend is a web-based tool to facilitate the iterative updating and constant communication required to transform the use of new strategic plan. Two examples of software for strategic execution are Xitracs and Cascade. Xitracs is marketed to colleges and universities and is currently being used by Valencia College. Cascade is used by Johnson and Johnson, UNICEF and various K-12 schools and districts. It offers a drag-and-drop builder for the plan itself and support for development of KPIs that can be segmented into monthly or yearly targets. Using this tool, OCPS could easily provide both internal and public-facing dashboards of performance metrics aligned to the goals. By purchasing a cloud-based tool, and empowering the Office of Strategy Management to own all continuous improvement processes, OCPS can increase coherence, impact and efficiency, and decrease frustration, to ensure that the final product aligns existing scorecard structures, and can be used to measure, monitor and adjust actions as needed.

Invest Long Term to Produce Still More Change. If Phase II concludes in December 2019 with the publication of the refreshed OCPS 2024 Strategic Plan, then there’s an opportunity to consider Phase III. It’s always a challenge for
organizations to make and sustain cultural shifts and this will be true for OCPS as well. The key will be to ensure that the district’s continuous improvement processes are iterative, consistently evaluated and produce results. To do this the organization will need to develop its capability for adaptive change. This will require constant communication and feedback, alignment of expectations and outcomes, and pressure testing. Consider creating quarterly or semi-annual business reviews that are opportunities for performance metric reporting, scorecard updating and problem-solving in real time across multiple divisions. Instituting these regular cycles will continue to decrease silos and increase alignment throughout the organization.

Long term, I recommend that OCPS inventory all the accountability processes currently being used throughout the district and work to align the goals and outcomes of these systems to the strategic plan. Consider items such as the Business Plan Process, the Internal Auditors’ risk analysis, productivity logs, and even School Improvement Plans. I would build a case for tight alignment of all of these existing mechanisms to the strategic plan.

Finally, I recommend continuing to align evaluation structures to performance metrics included in the strategic plan. Fullan & Quinn (2016) posited that “successful systems establish strong degrees of internal accountability that serve them well in the external accountability arena” (p. 126). Currently the Superintendent’s evaluation includes the annual progress toward attainment of these overarching strategic plan goals. Her Cabinet is evaluated based on results of their Extended Scorecards. There is an opportunity to expand these formal
accountability structures beyond the C-suite to district administrators and non-instructional support personnel. Based on Florida Department of Education requirements, teachers and school administrators are evaluated using student achievement metrics. These metrics are captured in the strategic plan. Communicating to these important stakeholders that their success rolls up into the success of those supporting them could be powerful drivers for increasing coherence and buy-in of the plan district wide. Taking a page from the business world, OCPS could also consider aligning compensation structures to goal attainment.
Implications for Sector

Virtually every school district across the nation invests its finite resources to develop and sustain a strategic plan. Many systems transparently publish their performance metrics and progress in attaining their goals. However, even with ubiquitous utilization of strategic planning as tool for increasing coherence and advancing continuous improvement efforts, as a sector we are not making progress on our core mission. A recent report confirmed,

The achievement gap between haves and have-nots in the U.S. remains as large as it was in 1966, when James Coleman wrote his landmark report and the nation launched a “war on poverty” that made compensatory education its centerpiece. That gap has not widened, as some have suggested. But neither has it closed. (Hanushek, Peterson, Talpey & Woessmann, 2019)

Informed by this reality, and based on the work of this strategic project, I make the following recommendations.

Build Upon What We Know. Improvement Science in education is a robust and evolving field. The framework created by The Carnegie Foundation for the Advancement of Teaching can be applied widely throughout the sector. See Figure 5 for visual of the Six Core Principles.
The Six Core Principles of Improvement

1. Make the work problem-specific and user-centered.
   It starts with a single question: “What specifically is the problem we are trying to solve?” It enlivens a co-development orientation: engage key participants early and often.

2. Variation in performance is the core problem to address.
   The critical issue is not what works, but rather what works, for whom and under what set of conditions. Aim to advance efficacy reliably at scale.

3. See the system that produces the current outcomes.
   It is hard to improve what you do not fully understand. Go and see how local conditions shape work processes. Make your hypotheses for change public and clear.

4. We cannot improve at scale what we cannot measure.
   Embed measures of key outcomes and processes to track if change is an improvement. We intervene in complex organizations. Anticipate unintended consequences and measure these too.

5. Anchor practice improvement in disciplined inquiry.
   Engage rapid cycles of Plan, Do, Study, Act (PDSA) to learn fast, fail fast, and improve quickly. That failures may occur is not the problem; that we fail to learn from them is.

6. Accelerate improvements through networked communities.
   Embrace the wisdom of crowds. We can accomplish more together than even the best of us can accomplish alone.

Figure 5: The Six Core Principles of Improvement: A framework for continuous improvement created by The Carnegie Foundation for the Advancement of Teaching

Highlighting one key idea from this framework, the sector would benefit from increased application of “rapid cycles of Plan, Do, Study, Act (PDSA) to learn fast, fail fast, and improve quickly.” As is stated, “That failures that may occur is not the problem; that we fail to learn from them is.” This will be a paradigm shift for the sector as a whole, and require leaders who can manage and lead through adaptive change. School districts are highly political environments, and have a general aversion to change. De-stigmatizing failure within these organizations will be a long-term challenge worthy of attention.
Lessons can also be learned from other sectors who have a longer history of aligning their continuous improvement efforts with their approaches to strategic planning. Examples to borrow from include the Lean improvement process used in business more broadly, and the Six Sigma process touted in the healthcare industry. Within the greater educational ecosystem, colleges and universities have more developed systems and supports for strategy planning and management. Most institutes of higher education have separate offices of strategy management while most K-12 systems do not. The sector benefits from learning from these examples, and seeking to create uniform strategic planning structures. While this change will be difficult to achieve because of the decentralized reality of the American school system, it has the potential of increasing systems efficiencies, decreasing fragmentation, and signal that school systems value and are committed to future planning, measuring of outcomes, and monitoring of progress. By decreasing variation in approaches, the sector can increase the impact of their efforts. I recommend the education sector work toward establishing a uniform approach to strategy management for K-12 systems.

**Invest in Systems Research.** While there is much written regarding continuous improvement at the classroom and school level, there is little scholarship that highlights a systems perspective. More research should be conducted, supported and published regarding successful implementation of systems-level change within the education sector. As my strategic project confirmed, solutions must address both the technical and an adaptive facets of the challenge. This research should prioritize balanced approaches that impact
actions, as well as hearts and minds. Recommending swift organizational changes, requiring additional data collection, and blessing new scorecard structures are shortsighted solutions, and do not guarantee improvements. One illustrative example is highlighted in a recent Harvard Business Review article entitled, *Data Was Supposed to Fix the U.S. Education System. Here’s Why It Hasn’t* (Rodberg, 2019). The author argues that districts are asking the wrong questions about data collection. He stated, “The key question is not, “will the data be useful?” (Of course it can be) or, “will the data be interesting?” (Yes, again.) The proper question for leaders to ask is: “will the data help us make better-enough decisions to be worth the cost of getting and using it?” So far, the answer is “no.” (p. 4). The learning from this example can be more broadly applied to improvement in strategy articulation and monitoring. The sector must balance the effort and impact of these decisions, for as confirmed by my work with OCPS, aligning continuous improvement efforts to strategic plans is complex.

**Leverage The System.** The United States public education system serves more than 56 million students, across approximately 100,000 schools (NCES, 2018). There are about 15,000 school districts who collectively have the annual purchasing power of more than $650 billion (NCES, 2018). The sector has an opportunity to better leverage this collective strength in numbers. To accomplish this, I recommend utilizing the research on collective impact theory. Collective impact theory tells us that by using the five key conditions of (1) a common agenda, (2) shared measurements, (3) mutually reinforcing activities, (4) continuous communication and (5) backbone support, large-scale change can occur (Kania &
Kramer, 2011). The sector should articulate that increasing the impact of current strategic planning and management structures is a common challenge, and then agree to collaborative problem-solving. There is an opportunity for established organizations such as the Council of Great City Schools, the Aspen Institute, the Broad Institute, or Harvard’s Public Education Leadership Program (PELP), to use their existing convening authority to act as the backbone support this theory requires. By gathering together representatives from various school system for an action-oriented learning experience, focused on increasing the effectiveness of strategic management, there is an opportunity to move the needle. Sessions should include the sharing best practices, collectively problem-solving and supporting visionary strategy development. This group could agree upon shared measurements, and commit to continuous communication in service of increasing their collective efficacy. Artifacts and learnings from these engagements could be shared on an open-source website, and promoted to impact the sector more broadly.

**Focus on Leadership Development.** The sector would benefit from augmenting existing leadership programs to include coursework on continuous improvement science, strategic planning, and change management. To improve upon the status quo, research confirms that effective leadership is key, and therefore, discussion on the leadership pipeline deserves attention. Most superintendents progress through the ranks from teacher, to building leader, to district leadership. When they arrive at this system-wide leadership role they must oversee important organizational functions, such as finance, facilities, and
operations, where they often have had little practical experience. Exposing aspiring systems-level leaders to core organizational learning and experiences outside of teaching and learning, is critical for their future success. Furthermore, considering continuous improvement and strategy management as learned skills, aspiring systems leaders should receive training and practice in these principles. Kotter (2012) reminds us that there is a distinction between management and leadership. As my strategic project confirmed, having an opportunity to learn and practice how to lead others through adaptive change is critical learning for the success of future leaders. The Harvard Graduate School of Education’s Doctorate in Educational Leadership (Ed.L.D.) is unique in its offering of a ten-month residency-based practicum for aspiring leaders. This hands-on requirement allows demonstration and reflection on the skill and art of leading. More executive leadership programs should include long-term experiential learning in addition to knowledge and skills development.

**Consider Succession Management.** In 2014, the Council of Great City Schools reported that the average tenure of a large, urban public school district superintendent was around three years. New superintendents generally craft an entry plan that includes a listening tour and a revisiting, if not full overhaul, of the strategic plan. Decreasing disruption created by the short tenure of superintendents would be welcomed. Additional scholarship on this topic should offer recommendations for entry planning and succession management that addresses this reality, and fosters continuous progress.
Effective change management creates coherence which can be communicated throughout an organization by using an effective strategic planning and management process. Improving outcomes for students must be the central focus of public education. Therefore, there must be a sector-wide commitment to fostering and strengthening continuous improvement efforts. Research confirms that effective strategic planning and management processes support this goal, and substantiate this discussion as apropos and timely. AASA, the School Superintendents Association, devoted the entirety of their most recent (March 2019) publication to the subject of continuous improvement. Articles included *Healing our Systems and Making Improvements Stick*, *Tools and Tactics for Organizational Excellence* and *Four Measures for Creating a Culture of Improvement*. The editor shared, “it’s rare for *School Administrator* to devote the majority of its editorial theme coverage to a single school district.” Yet, “this month, we have chosen to paint a picture of continuous improvement on the school system level” (Goldman, 2019, p.4). The sector is served well by uplifting role models who have succeeded in making marked improvements towards their goals, fostering understanding and conviction about this topic, and developing talent and skills for leaders to drive systems-level improvement (Lawson & Price, 2003).
Conclusion

How can school systems more effectively utilize strategic planning and management to drive continuous improvement? By seeking to analyze this research question, I applied change management theory to the work of my strategic project in Orange County Public Schools. Through application of theory and practice, I led the district through Phase I of their goal to update an existing strategic plan. Through this leadership practice, I explored how education systems can utilize performance metrics, scorecard structures, and strategic execution to guide and manage their continuous improvement efforts. Findings reveal that addressing technical and adaptive elements of change are crucial for success. School districts have an opportunity to respond to an ever-changing environment, and to stay ahead of future crises by engaging in an iterative strategic management process. In the end, all stakeholders are better served when there is increased alignment between continuous improvement efforts and an organization’s strategic plan.


NCES, National Center for Education Statistics (2018). Retrieved from


Smith, D., & Baum, C. (2009). Delivering Results, Developing Leaders. A


Appendix


Webpage with District Scorecards
ACCELERATE STUDENT PERFORMANCE

Background:
In order to ensure that students have the skills needed to succeed, we must help all students accelerate their academic performance toward meeting and exceeding standards. One measure of career and college readiness produced by the College Board shows that only 42.6% of students in the class of 2014 are meeting benchmarks for this process. The percent of students meeting benchmarks is even lower for Black and Hispanic students, 15.8% and 23.4% respectively. Without accelerating student performance, educational institutions will not be able to prepare students for entry into meaningful careers. Accelerating student performance ensures students have opportunities to choose career pathways that maximize their skills and interests.

Yearly summative assessments provide information concerning student understanding of statewide standards. Statewide performance on English/Language Arts (E.L.A) and mathematics standards is measured through the use of the Florida Standards Assessments (FSA). In addition, the Florida Standards Alternate Assessment (FSAA) is administered to students with exceptionalities that prevent them from taking the FSA. Student performance is measured as either the percent of students meeting state standards or the percent of students demonstrating more than one year of growth on statewide assessments.

Refer to Data Point Definitions for an explanation of the data.

Data:

Increase the percent of students meeting state standards on state assessments in English Language Arts by 10 percentage points by the year 2020

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Data Source: District Grade Report: Florida Department of Education (http://schoolgrades.fldoe.org/)

Increase the percent of students meeting state standards on state assessments in Mathematics by 10 percentage points by the year 2020

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>52%</td>
<td>52%</td>
<td>53%</td>
<td>53%</td>
<td></td>
<td></td>
<td>62%</td>
</tr>
</tbody>
</table>

Data Source: District Grade Report: Florida Department of Education (http://schoolgrades.fldoe.org/)
Example of Business Plan attached to each District Scorecard

Teaching and Learning
Business Plan
2015 – 2020

Goal: Intense Focus on Student Achievement

Current Condition

In order to ensure that students have the skills needed to succeed, we must help all students accelerate their academic performance toward meeting and exceeding standards. One measure of career and college readiness produced by the College Board shows that only 22.6% of students in the class of 2014 are meeting benchmarks for this process. The percent of students meeting benchmarks is even lower for Black and Hispanic students, 15.8% and 23.4% respectively. Without accelerating student performance, educational institutions will not be able to prepare students for entry into meaningful careers. Accelerating student performance ensures students have opportunities to choose career pathways that maximize their skills and interests.

Yearly summative assessments provide information concerning student understanding of statewide standards. Statewide performance on English Language Arts (ELA) and mathematics standards is measured through the use of the Florida Standards Assessments (FSA). In addition, the Florida Standards Alternate Assessment (FSAA) is administered to students with exceptionalities that prevent them from taking the FSA. Student performance is measured as either the percent of students meeting state standards or the percent of students demonstrating more than one year of growth on statewide assessments.

Theory of Action

If we develop administrators’ and teachers’ competencies to ensure effective and centralized rigorous instruction, implement a focused progress monitoring system, and expand access to early learning opportunities, we will accelerate student performance.

Measurable Objectives

<table>
<thead>
<tr>
<th>Baseline</th>
<th>Midpoint</th>
<th>Target</th>
</tr>
</thead>
</table>

1. Increase the percent of students meeting state standards on state assessments in English Language Arts by 10 percentage points by the year 2020
   - 54% | 59% | 55% | 66% |

2. Increase the percent of students meeting state standards on state assessments in Mathematics by 10 percentage points by the year 2020
   - 52% | 57% | 58% | 62% |

3. Increase the percent of students meeting state learning gain requirements in English Language Arts by 10 percentage points by the year 2020
   - 52% | 57% | 52% | 62% |

* Represents BROAD strategies

Teaching and Learning
Business Plan
2015 – 2020

<table>
<thead>
<tr>
<th>Year</th>
<th>Strategies</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015 – 2020</td>
<td>1. Refine OCPS’ progress monitoring system in grades K-12 in English Language Arts, Mathematics and other statewide-assessed courses to include the following: Where (A-R)</td>
<td>Teaching and Learning</td>
</tr>
<tr>
<td></td>
<td>a. Targeted professional development on how to create appropriate and effective formative assessments through their Professional Learning Communities (PLCs)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Provide a formative assessment system to support classroom instruction</td>
<td></td>
</tr>
<tr>
<td>2013 – 2020</td>
<td>2. Provide differentiated professional development opportunities in the areas of: Where (A-R)</td>
<td>Teaching and Learning</td>
</tr>
<tr>
<td></td>
<td>a. Content- and Standards-based instruction (specifically targeting the areas of literacy and numeracy)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Pedagogies through the instructional framework</td>
<td></td>
</tr>
<tr>
<td>2013 – 2020</td>
<td>3. Provide differentiated professional development opportunities for coaches and teacher leaders in the areas of: Where (A-R)</td>
<td>Teaching and Learning</td>
</tr>
<tr>
<td></td>
<td>a. The coaching cycle</td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Lead teacher planning</td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Data-based decision making</td>
<td></td>
</tr>
<tr>
<td></td>
<td>d. Providing actionable feedback</td>
<td></td>
</tr>
<tr>
<td></td>
<td>e. Technology integration</td>
<td></td>
</tr>
<tr>
<td></td>
<td>f. Formative assessment development</td>
<td></td>
</tr>
<tr>
<td>2015 – 2020</td>
<td>4. Embed and implement a support system to ensure effective and rigorous instruction through: Where (A-R)</td>
<td>Teaching and Learning</td>
</tr>
<tr>
<td></td>
<td>a. Administrator coaching in the Leadership Framework</td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Analysis of assessment, observation and feedback data to identify needs and trends</td>
<td></td>
</tr>
<tr>
<td></td>
<td>a. Expanding the number of early learning opportunities</td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Providing information to families on early childhood development</td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Leveraging community partnerships to support the attainment of developmental milestones</td>
<td></td>
</tr>
</tbody>
</table>

* Represents BROAD strategies
### Example of Extended Scorecard Structure

<table>
<thead>
<tr>
<th>Goal</th>
<th>Objective</th>
<th>Owner</th>
<th>Baseline Data 2014-15</th>
<th>Results 2017-18</th>
<th>Status</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intense Focus on Student Achievement</td>
<td>Earn and maintain a district letter grade of A based on the components and processes for school grades (82% of total points earned)</td>
<td>Teaching and Learning</td>
<td>8 (56% of total points earned)</td>
<td>8 (59% of total points earned)</td>
<td>↑</td>
<td>The 2017-18 results show a 3 percentage point increase in total points earned.</td>
</tr>
<tr>
<td></td>
<td>Decrease the number of schools earning a letter grade of D or F based on the components and processes for school grades to zero</td>
<td>Teaching and Learning</td>
<td>26 schools: 0 schools: 20 F schools: 6</td>
<td>14 schools: 0 schools: 11 F schools: 3</td>
<td>↑</td>
<td>The number of F schools reflects a decrease of 50% and the number of D schools reflects a decrease of 40%.</td>
</tr>
<tr>
<td></td>
<td>Increase the percentage of graduates scoring a 3, 4, or 5 on an AP exam during high school to 42%</td>
<td>Teaching and Learning</td>
<td>32% (2013-14 Graduates) New Baseline</td>
<td>34% (2015-16 Graduates)</td>
<td>↑</td>
<td>SAT day strategy</td>
</tr>
<tr>
<td></td>
<td>Increase the percentage of students passing the Algebra 1 EOC during middle school to 46%</td>
<td>Teaching and Learning</td>
<td>36%</td>
<td>43%</td>
<td>↑</td>
<td>SAT day strategy</td>
</tr>
<tr>
<td>High Performing and Dedicated Team</td>
<td>Increase the percentage of district and school administrators scoring “Applying” on their professional growth plan to 80%</td>
<td>Teaching and Learning</td>
<td>71%</td>
<td>75%</td>
<td>↑</td>
<td>The percentage has increased by 7% from the baseline year.</td>
</tr>
</tbody>
</table>
Appendix B: Example of PowerPoint used for Division Professional Development (Human Resources Division)
# Appendix C: Pre/Post Extended Scorecard Example, Teaching and Learning

<table>
<thead>
<tr>
<th>Goal</th>
<th>Objective</th>
<th>Owner</th>
<th>Baseline Date 2014-15</th>
<th>Results 2017-18</th>
<th>Status</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal Focus on Student Achievement</td>
<td>Learn and maintain a district letter grade of A based on the components and processes for school grades 86% of total points earned</td>
<td>Teaching and Learning</td>
<td>9 (56% of total points earned) 2015-16 New Baseline</td>
<td>8 (59% of total points earned)</td>
<td></td>
<td>The 2017-18 results show a 3 percentage point increase in total points earned.</td>
</tr>
<tr>
<td></td>
<td>Decrease the number of schools earning a letter grade of D or F based on the components and processes for school grades to below 50%</td>
<td>Teaching and Learning</td>
<td>26 schools 0 schools 20 F schools: 6</td>
<td>14 schools 0 schools: 11 F schools: 3</td>
<td></td>
<td>The number of F schools reflects a decrease of 50% and the number of D schools reflects a decrease of 45%.</td>
</tr>
<tr>
<td></td>
<td>Increase the percentage of graduates scoring college ready on either the SAT or ACT assessment to 50%</td>
<td>Teaching and Learning</td>
<td>28% (2014-15 Graduates) New Baseline</td>
<td>37% (2016-17 Graduates)</td>
<td></td>
<td>SAT day strategy</td>
</tr>
<tr>
<td></td>
<td>Increase the percentage of graduates scoring a 3, 4, or 5 on an AP exam during high school to 42%</td>
<td>Teaching and Learning</td>
<td>32% (2013-14 Graduates)</td>
<td>34% (2016-17 Graduates)</td>
<td></td>
<td>Based on official state data.</td>
</tr>
<tr>
<td></td>
<td>Increase the percentage of 9th grade students that passed the Algebra 1 EOC during middle school to 46%</td>
<td>Teaching and Learning</td>
<td>35%</td>
<td>43%</td>
<td></td>
<td>The percentage has increased by 7% from the baseline year.</td>
</tr>
<tr>
<td></td>
<td>Increase the percentage of students passing the Algebra 1 EOC by the end of 9th grade</td>
<td>Teaching and Learning</td>
<td>7%</td>
<td>7%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Efficient Operations</td>
<td>Ensure that asset management targets are met so that under 15% of assets are lost or damaged</td>
<td>Teaching and Learning</td>
<td>0.13%</td>
<td>0.08%</td>
<td></td>
<td>The percent of lost or damaged assets decreased from 0.13% in 2015-16 to 0.08% in 2017-18.</td>
</tr>
<tr>
<td>Safe Learning and Working Environment</td>
<td>Increase the average of stakeholder ratings for questions regarding Standard 0 (Resources and Support Systems) on the Annual Survey to 4.30 (measured on a scale from '1' to '5')</td>
<td>Teaching and Learning</td>
<td></td>
<td></td>
<td></td>
<td>The average rating has increased by .08 from the baseline.</td>
</tr>
<tr>
<td></td>
<td>Decrease the number of students with at least one out-of-school suspension by 20%</td>
<td>Teaching and Learning</td>
<td>11,154</td>
<td>7,005</td>
<td></td>
<td>The number of students with at least one out-of-school suspension was increased by 37%.</td>
</tr>
<tr>
<td></td>
<td>Include requirements for Marjory Stoneman Douglas</td>
<td>Teaching and Learning</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sustained Community Engagement</td>
<td>Increase the number of parents, family and community members who attended Parent Academies to 5,300</td>
<td>Teaching and Learning</td>
<td>3,267</td>
<td>5,650</td>
<td></td>
<td>Baseline changed to reflect participating Parent Academy members only. Original data included participants and Parent Academy monitors.</td>
</tr>
</tbody>
</table>

Pink shaded = Drop
Green shaded = Add
Red font struckthrough = Remove
Green font = Add
Blue font = Question
Appendix D: PowerPoint Presentation of Strategic Project to Cabinet