



## **About the Authors**

- J. Maddocks
- S. Novkovic
- S. Smith

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For more information, contact us: Social Economy and Sustainability Research Network, c/o Research House, Mount Saint Vincent University, Halifax, Nova Scotia B3M 2J6  
Tel: 902-457-6748  
Fax: 902-457-5547  
E-mail: [seproject@msvu.ca](mailto:seproject@msvu.ca)

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## Abstract

This paper is a result of a joint research project in the social economy between a community partner (an independent school) and academic partners. The school is a democratic organization, run by teachers and parents. The goal of the project was to find ways to improve communication and reporting about general performance of the school. Among other issues, the group was looking for an appropriate approach to measure its performance, and maintain its unique characteristics, both from the organizational perspective and its approach to elementary education. As with other small democratic organizations, such as cooperatives, the challenges are that members may not have the right organizational knowledge and training, and that the organization often moves forward on a trial and error basis, relying on member experiences, networks and efforts. In that context, we examine the lessons of the balanced scorecard approach (Kaplan & Norton 1996), and devise some tools that may shape future efforts in this organization. We identify some challenges ahead, and draw parallels for other similar democratic organizations.

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## **1. Introduction**

Performance measurement in schools is often linked to discussions on how to improve student performance. It is associated with a desire to improve the effectiveness and efficiency of schools, although views on the nature of such improvements and the appropriate measures to be applied vary. There has also, perhaps, been an emphasis on a top down approach, with measures often defined by external regulatory bodies and centering on assessing student achievement, typically through formal testing. In addition, and linked to student performance, there has been some interest in assessing teachers' performance, at least partly on the basis of their students' achievements. One expression of this has been the re-emergence of performance related pay for teachers in the U.S. and U.K. (Burgess et al., 2001).

Our interest is in taking a wider perspective on performance; considering the multi-stakeholder nature of the organization; and seeking to explore the potential for developing performance measurement tools at the individual organization level and with the participation of key stakeholders. Our goal is not to ignore the importance of student achievement, but rather to emphasize the different meanings of achievement to different stakeholders instead of rely on the standardized testing tools. In addition, we aim to balance these different definitions of achievement with other aspects of performance and explore the potential for a more rounded form of evaluation that more closely reflects the particular goals and identity of the organization and its members.

The Canadian elementary school which is the focus of our study has a particular teaching philosophy that emphasizes the balanced academic and social development of a child. Within the philosophy of our focal school, standardized testing can be viewed as counterproductive in that it produces an educational strategy aimed at obtaining particular test results, rather than developing children as problem-solving individuals within a wider society. Performance related teacher pay also violates the culture and intentions of this organization, which is based on a strong sense of cooperation, teamwork, equity and equality, so that teacher evaluation and student success must be viewed in a different framework.

The balanced scorecard approach (BSC, Kaplan & Norton 1992, 1996, 2004) appeals in our case because of its emphasis on balancing a range of financial and non-financial performance measures for organizations. It also has a potential for actively engaging stakeholders during the important process of developing measures within a strategic planning framework. In Section II we take a closer look at the BSC approach in reference to evaluation of school performance.

Section III lays out our experience with stakeholder engagement and evaluation so far, followed by Section IV, which examines how the school fares under the balanced accountability model (Jones, 2004). Section V sketches some lessons and challenges ahead, and Section VI outlines our conclusions and recommendations.

## **2. The balanced scorecard**

The BSC approach (Kaplan & Norton 1992, 1996; Niven 2003) assumes that financial performance measures on their own provide a limited historical view of an organization's performance, and that financial information, while an essential element in planning and decision making, needs to be balanced by other perspectives. Specifically, in addition to financial measures, it adds measures in relation to: customers (how do customers see us?); internal processes (at what must we excel?); and learning and growth (how do we continue to improve?). The BSC also seeks to concentrate attention on a relatively small, manageable number of key measures, which can assist in focusing attention on key goals. If carefully chosen, the resulting measures can potentially avoid the pitfalls of more ad hoc, eclectic compilations which lack focus on critical factors.

One appeal of the process of developing, implementing and using the BSC is that it provides opportunities for involving a wider range of people not previously involved in discussions of performance measures (Kaplan & Norton 1992). This wider participation results in an important shift away from a controlling perspective, traditionally driven by the finance function, to one that embraces vision and strategic thinking. This is particularly true in small organizations where people at all levels can potentially be involved in the process (Andersen et al 2001), and therefore seems suitable for a democratic organization like the one in our study.

In the non-profit organizations context the customer perspective may be placed at the top of the BSC, moving finance from its preeminent spot (Kaplan & Norton 2001a). More importantly, non-profits can place their overarching mission objective at the top of their scorecard, since the mission represents their reason for existing and their point of accountability with society. The mission represents the long term goal, while the four categories can then be used to represent short and medium term objectives. Such division into more manageable shorter term goals appears to have merit for non-profits if one takes into account the findings by Sawhill and Williamson (2001), who report difficulty of measuring mission impact for non-profits, but relative success when they measure mission-oriented goals.

Kaplan and Norton (2001b) notes the value in communicating the BSC to all levels of the organization and points to the role of the BSC in clarifying strategic thinking. Numerous other case studies also indicate the differing levels of intensity of use and integration of the BSC within planning and decision making processes, as well as the various ways of applying the approach to different functions within an organization. Some organizations, for example, have made extensive use of the BSC and performance measures and management in order to better understand the relatively complex workings and activities of the organisation and improve decision making at various levels (Pointer et al., 2005; Kaplan & Norton 2001b; Meliones 2000). On the other hand, some smaller organisations may not go as far as implementing BSC measures or indicators, but value the initial process of discussion and consultation, providing an opportunity to share information and reflect on the organisations activities and clarifying strategic goals (Lawrie, Andersen, & Cobbold 2006; Manville, 2006; Sioncke 2005; Halpern & Richman, 2002). Lawrie et al., (2006) suggest that there is a role for considering performance measures and performance management in small organizations but in a way that takes account of both limited resources but also the much closer involvement of decision makers to the day to day activities of the organisation. This closeness to daily activity allows those involved in managing to see some aspects of performance first hand and so reduces the need for the range of performance data required in larger organizations.

Some challenges with the implementation of BSC mentioned in the literature are that it is time consuming, because to be effective it needs to: be modified to reflect a particular organization's goals and perspectives and produce measures that are relevant to that organisation; it needs strong long term internal leadership, motivation and support for its development and implementation, and; poor design and poor implementation may lead to its failure. On the positive note, the BSC is viewed as a potential vehicle for greater participation and empowerment of staff and members; it can extend beyond strategic management and assist with organizational change; it can also evolve from a measurement to a management tool. The process of development of the BSC may also have positive impact on the strengthening of organizations' information and communication systems (Halpern & Richman, 2002). A word of caution comes from Forbes (1998), who stresses that, generally speaking, performance measures are limited in nature, and that the approaches of devising measures for non-profits must allow for reflection, communication and learning.

Some studies examine the use of the BSC in education. They apply to schools in the US (Carr, 2005; Karathnos & Karathnos, 2005) and elsewhere (e.g., Malaysia, see Lee 2006; Portugal, see Saraiva et al., 2003; and the UK, see Storey 2002), as well as to institutions of

higher education (e.g., Cullen, et al., 2003; O’Neil et al., 1999). These and other studies applying the BSC model to measure the effectiveness of schools offer some relevant conclusions for our case. For example, there is recognition that development of the scorecard needs to involve staff in order to build commitment, and constant review and action is needed to assess strategy (Cullen, et al.,2003). The importance of self-evaluation is also indicated as a BSC advantage (Saraiva, et al., 2003), stressing that teacher-designed evaluation tools may have more merit than measures imposed by the outsiders (Storey, 2002).

An interesting view is offered by O’Neil et al., (1999) who see the BSC as an opportunity to effect change from within and structure measures internally before they are externally imposed. In other words, they suggest that the BSC development has the potential to satisfy regulators demands for measurable performance and accountability, while also encouraging internal engagement and consultation in the process. Another point they make is that most effective use of BSC depends on the agreement about the core processes, their assessment, and acceptance of credible mission-driven measures of performance.

The need to strike a balance between the various interests of stakeholders is also echoed in the literature, as is the need to be cautious in applying a model originally designed for use in a market economy setting. Dimmock and Walker (2004) underscore the importance of avoiding too narrow a focus on market measures (such as enrolment and finance) and support the need for a more holistic approach to strategy including a coherent set of values. Strategic intent and leadership for school improvement should be value driven, learning focused, include cultural context, and be long term.

Lastly, Jones (2004) stresses that student testing need not imply student learning, and believes that schools should be held accountable for physical and emotional well being of students, student learning, teacher learning, equity, access and improvement. He also emphasizes that schools should be accountable to their “primary clients” (students; parents and the local community), with accountability achieved through multiple measures including qualitative and quantitative approaches, seeking to improve student learning and school practice, equity, and access; provide guidance and information for decision making; and reflect a democratic approach. In Jones’ view, the educational version of the BSC’s four components would consist of: 1) Student learning; 2) Opportunity to learn; 3) Responsiveness to students, parents and community; and 4) Organizational capacity for improvement, replacing the BSC business model components: Financial; Internal business; Customer; Innovation and learning. We return to this study in Section IV. In light of these arguments, most of which apply to our case, we describe the

process of development of some qualitative measures for the school, which evolved within the organization.

### **3. Performance measures for an independent school-a case of a small democratic organization**

#### 3.1. Background

We are looking at a case of a school governed by a Board of Directors (consisting of parents and teachers) and managed daily by teachers and one administrative support person. In the few years prior to the beginning of this project, the school has undergone expansion in the number of classes and age groups, as well as an overall increase in the number of students from approximately 80 to the present 168, in less than two years. A new building was built in a new location to house the expanded school.

The school has been in operation for over 30 years as a joint effort of parents and teachers. It started small, and grew in stages over the years to include children from Kindergarten to grade 4, then expanded up to grade 6, and finally to its current size that includes grades pre-Kindergarten to grade 9 (children ages 4 to 15).

The teaching philosophy of the school does not conform to the standards of the public school system, nor other private schools in the region. It subscribes to a holistic approach to education (see Gamberg et al., 1988): experiential learning; multi-age classrooms; theme-teaching rather than teaching by subjects; it ascribes to the scientific methods in learning, so that children of all ages engage in brainstorming, organization, research and delivery; and it does not use any formal testing as an evaluation method, save for the grades 8-9 students who require this skill for entry into the public or private high school systems. At younger ages (up to grade 6) report cards are also not produced, thus requiring extensive communication and trust between teachers and parents.

In terms of the organization, teachers and parents share responsibilities on a number of committees, which have a supporting role in the operations of the school. In other words, the management and governance is conducted by laypersons, even though teachers who have been with the school longest have accumulated knowledge about the organization and carry its vision. Strategic planning for the school has typically been haphazard, even though strategic planning sessions have been used, particularly when growth was on the agenda. However, fast growth has also meant that the fashion in which the school was run when it was small is no longer producing the same results now that the school has doubled in size.

Communication among stakeholders was negatively affected by the sharp increase in size, thus Board of Directors has engaged in discussions about performance evaluation and effective communication within the school. The school joined in on a Social economy research project, funded by the Social Sciences and Humanities Research Council of Canada, as a partner with local academics, and together the partners have been examining these issues over the past two years.

### 3.2. Initial stages

Given the nature of the organization, the initial challenge was to achieve consensus about the purpose and scope of evaluation, and to agree on the process and methods. The process was driven by a small group of parents and the Head Teacher, and supported by the Board. It was recognized that a two-fold approach would be best: the school would engage in data collection and decisions about appropriate indicators and both quantitative and qualitative measures would be produced in the form of survey instruments for the stakeholder groups. Stakeholders were identified to be teachers, parents, students and the outside community, and it was decided to proceed with engagement of the two major stakeholder groups-teachers and parents- in the development of survey instruments. Ultimately, an Alumni Survey was also developed, but due to small sample sizes because of limited numbers of junior high school graduates to date, the results of this survey are not discussed in this paper.

The process started with survey development for a couple of reasons. One is that it was less time consuming, and less contentious. Participation from both stakeholder groups was required in order to make the tools relevant, and that implied discussions about issues that were then addressed by direct questions, rather than indirect measures. Further, there was some initial apprehension among the teachers about the purpose and use of evaluation, and concerns about tools and their “ownership”. A participative way forward through a dialogue was the only acceptable option. Also relevant was lack of clear understanding (or lack of discussions) about the possible indicators and measures to use and their relationships to outcomes. Given the schools cultural aversion to testing, the survey approach was seen as a better fit.

An invitation for volunteers was issued to the parents and teachers at the school, who then formed separate research groups. Both groups engaged in discussions about evaluation and reporting, and each developed a list of general issues of importance to them to become a part of the survey for their group. They also participated in the development of questions to address selected issues (see Appendix). Parents were involved in both the parent and alumni survey

development (but not the staff survey) and feedback from teachers was invited on all aspects of the process.

On the staff survey, teachers included questions that address overall job satisfaction, parent-teacher interactions, professional development, communication and leadership, governance, and evaluation. It is interesting to note that teachers wanted to report on the consistency of teacher evaluations, as well as the effectiveness of peer evaluation process that the school uses to achieve these aims. Also of interest was the issue of communication and stress on transparency in decision making. The parent survey included questions about the overall school life of the children, curriculum, parent-teacher interactions, school environment, governance and administration, as well as special programs in the school.

Parallel to this process, the school engaged in revamping the mission statement, so that other efforts could be aligned with the mission, but also to develop a common understanding of the school's mission and purpose so that the measures could be more effective.

The surveys were constructed using standard psychometric approaches in order to ensure adequate balance (positive and negatively phrased items) as well as appropriate response scales (e.g., likert type forced choice scales) to allow for quantitative analysis, and open-ended comment-based responses to allow for qualitative analyses. This dual approach allowed respondents to provide information in the format they felt most comfortable with. Surveys, once developed, were discussed in three separate focus groups; one for parents, one for teachers, and an additional one with the graduates of the school for the survey of the alumni. Changes were made to the survey in order to ensure that all topics of interest were being covered.

### 3.3. Results and reporting

As can be seen in the Appendix, three surveys were constructed: one for the parents, one for the staff of the school, and one for the students who graduated from grade 9. The parent survey first asked parents to report the class level of the child concerning whom the respondent was answering the questions. For those families with more than one child in the school, parents were asked to respond to the child specific questions once for each child. Overall, parents responded to questions distributed across nine sections of the survey:

- *Overall Impression*
- *Parent-Teacher Interactions*
- *Curriculum Content*

- *Classrooms & Outdoor Environment*
- *Your Child and the School*
- *Before / After-School Programs*
- *Other Programs and Activities*
- *Open-ended Questions*
- *Administration and Board of Directors*

One hundred and eleven respondents started the survey, 19 of whom had a second child in the program and one of whom had a third child in the program. Thus, in total, 131 surveys for the child-specific portions were started and 111 surveys for the non-child-specific items were started. There was some attrition throughout the survey, reducing the total number of child-specific responses from 131 to 125. Overall, based on 148 students enrolled at the time of the survey, this translated to a response rate of 89% - an excellent response rate by any standard.

The Staff survey was very similar in structure to the parents' survey. Staff responded to questions distributed across eight sections of the survey:

- *Overall Impression*
- *Parent-Teacher Interactions*
- *Job Aspects and Professional Development*
- *Communication and Leadership*
- *Administration and Board of Directors*
- *Evaluation and Assessment*
- *Clubs and Other Activities*
- *Open-ended Questions*

Sixteen of nineteen staff members responded to the survey representing an overall 84% response rate, also an excellent response rate. All surveys were completed online using a web-based survey collection tool. Clearly, the computer access necessary to complete the survey was not an issue, given the high response rate. It is also not surprising, given the higher than average socio-economic status of the respondents. Most if not all parents and staff have home computers and internet access, and we could therefore carry out web-based data collection. It should be noted however, that this approach may not be ideal for all contexts.

The data were coded and analysed by an independent research assistant. Data were analysed using standard statistical and qualitative analytic procedures. Although the purpose of this report is not to present this data in detail, it is worth noting that in the parent survey the responses were overwhelmingly positive, with a number of suggestions for improvements provided. In terms of the Staff survey, responses were similarly positive, although concerns were raised in a number of areas, particularly surrounding staff evaluations and hours worked.

An important part of our approach was stakeholder engagement and communication, thus a series of opportunities to meet with the respondent groups was organized. Besides the questionnaire development stage, stakeholder groups were engaged in the presentation of results. First, the data were presented to the Board, and then to the staff, and at the annual general meeting to all members. In addition to the oral presentations and discussion periods, two complete written reports were also made available. The alumni survey is still in progress, given the small number of graduates so far. It will take a few years before this data can provide conclusive results.

#### **4. The balanced accountability argument**

As stated in the introduction, Jones (2004) argues that health of (public) schools depends on a balanced accountability model. According to Jones, the four components of the balanced school accountability model are 1) student learning; 2) opportunity to learn; 3) responsiveness to students, parents, and community; and 4) organizational capacity for improvement. The author lays out arguments in favour of this approach, and possible indicators for each of the four performance areas. We believe that those arguments carry over to the school described in our study, even though it is a private school, given its philosophy and values it is based on. Therefore, we take a closer look at how the school in question fares under this model, and how our assessment addresses each of these issues, based on the results of the surveys and focus groups. We also discuss possible indicators that can be extracted from the surveys, and some that need yet to be developed to measure school's performance.

##### **4.1. Student learning**

Tracking student learning and progress is not a trivial task. Jones (2004), among many others, outlines the importance of reliance on a variety of assessment methods to evaluate

learning, rather than depend on standardized tests alone. Arguments against standardized testing as the learning assessment tool abound (see [www.fairtest.org](http://www.fairtest.org) for example), and in case of the school in our study, testing is not applied at all in grades pre-K to 8. The school uses a theme-based teaching approach, with ongoing evaluation of student progress (outlined in Gamberg, et al., 1988). Theme based learning in this context provides a specific topic (e.g., “Oceans” or “Discovery”) and all of the subjects in the school are included within this underlying theme. This links the subjects together and allows them to be taught in a fluid and connected (rather than esoteric and unconnected) fashion. Teachers report on students’ progress through ongoing communication with parents facilitated through small class sizes. As indicated in our survey, this occurs through frequent before and after school communications, as well as four times annually parent-teacher meetings. This approach seems to be received well by parents, especially for students at younger ages. Indeed, the majority of parents felt they understood where their children should be and how well they were doing, even with no testing or report cards (with the exception of the upper middle school children, who must have report cards in order to progress to High School in the public system).

An important issue with the lack of formal evaluation approach is the need to invest in professional development for teacher assessment training, in order to achieve high “assessment literacy” (Jones 2004). Another issue is that parent-teacher communication must be very effective in order to build trust and provide the “missing information”, that is, the benchmarks parents usually construct through test results. This is one area where small cooperative based schools may have some difficulty. It was clear in the staff survey that, being outside of the public system, opportunities for professional development were somewhat limited. In addition, because of the school’s unconventional approach, relevant learning opportunities were rare.

Therefore, a two-tiered approach seems important. First, the school needs to be clear on the *use* of evaluation methods other than (or complementary to) standardized testing. Our school does well on that score alone. Specifying those methods is an important element of communication with the stakeholders. The second part of the equation must be *evaluating* the effectiveness of those alternative methods. Indicators may be used to track the professional development, effective communication, and other measures of increased likelihood of learning. Another important element is parent perceptions of learning. Parents in our survey generally felt that their children were learning, but had some concerns about specific subjects (e.g., history, geography). This is in part due to the lack of communication about how topics get covered in the theme-based approach when there is no official time allocated to the subject. The shift needs to

be from evaluation-based performance to outcome-based performance. How do the children apply their knowledge?

Thus it was important in the survey that parent and staff opinions about learning were obtained. Select survey questions developed by the school's stakeholders can be used as indicators of specific goals or outcomes. Based on this approach, one could use answers to the questions related to teacher professional development, and teacher evaluation and assessment, but also parents' view of the learning and progress of their children overall, and in specific areas. Nonetheless, these are simple perceptions. One must also be aware that perceptions and reality may not always mesh. Thus it may be important to obtain and assess objective outcomes (reading level, math preparedness, and language skills) relative to same age peers in other schools.

#### 4.2. Opportunity to learn

In the public school context Jones (2004) argues that schools must provide equitable learning opportunities to all students. We are looking at a private school, and as such it is not open to all. Efforts are made to provide scholarships, but as in any private school, those are not sufficient to render the school "open to all". The school is guided by the interests of the insiders, and actions are typically taken to benefit the long term goals of the organization, rather than address the individual needs of the broader community of learners. Alternative interpretations of the opportunity to learn may be: access to knowledge; professional teaching conditions; learning environment; fair, humane and equitable treatment of students; as well as other factors. Generally speaking, schools need to devote time to develop measures of opportunities to learn within the school, as well as to evaluate teachers on some of these measures.

Results of the parent and staff surveys speak to the above issues for our target school. Access to knowledge by the teachers was reflected in staff responses to the professional development section. They felt that professional development, if relevant and available, was not always accessible, due to time and budget constraints. With a high teacher to student ratio, little money was left over for substitute teachers to allow for professional development. In addition, teachers reported working an average of 49.5 hours per week, thus little time was left for additional development. Teachers also noted that part of professional development was teacher evaluations, and although they found the peer evaluations useful, when deficiencies were found, they did not have much time to work on the issues identified. Furthermore, lack of time limited the frequency of evaluations, further impeding the opportunity to learn and develop.

Nonetheless parents highlighted the fair and ethical treatment received by the students, and lauded the fact that the small classes allowed for greater teacher-student contact. Both parents and staff discussed the importance of communication in the learning process, but both groups also felt that parent-teacher communication was sufficient, although parent-administration and teacher-administration communication could be substantially enhanced. Again, this deficiency was perceived to be due in large part to the multiple roles the administrators held (e.g., full time teacher as well as division head or head teacher).

An additional measure of students' opportunity to learn may be the availability of additional learning resources. A resource teacher is typically made available to assist with specific student needs, for example, but with limited resources this service may not be available at all times and to all students.

Some of relevant measures can be quantified (resource teacher availability; teachers hours per week; number of days per teacher in professional development; number of scholarships etc.), while others may be extracted from the survey (percentage of parents or teachers who rate a particular item highly, for example). If descriptive reporting format is chosen, it ought to be consistent over time to track progress.

#### 4.3. Responsiveness to students, parents and community

The process of development of performance measures we have described in this study is a reflection of responsiveness of the school in question to its stakeholders, and from that perspective the school is doing very well. Moreover, in our case the stakeholders include teachers who are typically viewed (as is in case of Jones 2004) as the executors of other stakeholders' demands, rather than equal partners in the delivery of education programs. It is worth noting that as a private school free of the demands of local geographical divisions, most teachers with children have had their own children educated at the school as well. Thus most teachers are or have been parents of students themselves. Generally speaking, the overall high investment by teachers is evidenced by a strong teacher presence in the management and school governance, which results from its history as a multi-stakeholder cooperative. This aspect makes the school portrayed in this study quite unique. The process of development of stakeholder surveys and other evaluation methods, as well as the use of those tools has the potential to further increase the responsiveness of the organization to its stakeholders. Improvements can be made to include community interests in a wider range of activities, but also to report on all the aspects of the school's responsiveness to the stakeholder needs.

It has been said that the simple act of measuring something causes it to change. This appears to be the case with this school as well. When the project started, the Board of Directors was eager to see the fruits of the study, as they believed that they had a strong school but there were areas for improvement. Importantly, as the results of the surveys were disseminated, clear areas for development were identified. Communication with parents, particularly around school policies and grade appropriate benchmarks, was identified as an area where improvements could be made, and in the time since the results were made known the school has made strides to address these and other issues. Survey results also identified strengths, and boosted confidence in the school's education methods and philosophy.

In order for endogenous changes to continue, it is of paramount importance that all stakeholders have a sense of ownership of the process and tools of performance evaluation. Stakeholder engagement is therefore essential in identifying issues, the development of measures, finding solutions, and strategic planning. This school continues to demonstrate achievement in those areas. A potential challenge is that stakeholder participation could be unbalanced, with parents being under-represented relative to their numbers. Effective communication with parents is therefore essential for success.

#### 4.4. Organizational capacity

The fourth aspect of a balanced school accountability model is organizational capacity to provide high levels of performance. The school in our study already delivers on the aspect of teacher empowerment, considered by Jones (2004) to be an integral part of capacity building. All teachers are deemed equal, all share responsibilities, and have a say in the school governance, teaching, curriculum and other aspects of the school life. In a typical public school the curriculum is pre-determined. At our target school, all of the teachers, including those new to the school, meet for two weeks in the summer to work out the curriculum for the year. This makes for substantial additional workload, but this level of control is mentioned as an important benefit by the teachers.

A downside of the control exerted by the teachers may be that this level of engagement includes a high degree of responsibility and workload. Thus, many of the teachers indicate that they (and their families) feel they are overworked and burned out by the end of each school year. Based on the survey, these perceptions can be quantified and reported. Additional indicators may also be developed as needed, such as numbers of teachers involved in particular decisions, teacher turnover, etc.

In addition, the teachers are paid significantly below public school teachers with similar level of experience<sup>i</sup>. Another potential issue, as mentioned above, may be that teachers have less time to prepare for teaching, document student progress, and engage in professional development compared to public schools. Indeed, the exceptionally high average hours per week worked is already more than 10 hours per week above an average teacher in the public system. Collective decision-making and support however, may take away some of the stress and improve performance. It is well established in the organisational stress literature (Carayon, 1995; see Kelloway & Day, 2005, for a review) that increased job control is predictive of reduced stress and negative stress outcomes. Therefore in order to ensure the continued improvement and development of the school and staff, these issues need to be closely tracked and reported on, in order to give them the attention they deserve. Also important is tracking of volunteer hours by all stakeholders, for both communication<sup>ii</sup> purposes, as well as awareness of value added and commitments to the school. On that note, measures of perceived openness (democratic decision-making) of the school to input from all stakeholders are also vital (for example, are all teachers exerting equal decision-making powers; are students engaged in decisions that concern them; are parents equal partners in decision-making; do the community partners influence decisions in any way, etc).

## **5. Lessons and challenges ahead**

As discussed in this study so far, the balanced scorecard approach outlines the importance of stakeholder engagement and strategic thinking in an organization (Kaplan & Norton 2007). Performance measurement of non-profit organizations is typically linked to the fulfillment of their mission, rather than financial goals (e.g., see Sawhill & Williamson 2003), while balanced mission-supporting goals would form the content for reporting, vision and strategic thinking. It is also emphasized in the literature that the key stakeholders of organizations have to decide on strategic goals, clarify the mission and define the organization's approach to both the competition and trade-offs it makes (Speckbacher, 2003). In order to fulfill that task, organization has to be transparent and to engage its stakeholders in all aspect of the organization's life and decision-making.

The mission of the school in our study, besides student *academic performance*, includes promotion and preservation of an educational approach, namely *theme learning in multiage*

groupings, with emphasis on *co-operation* rather than competition. It should therefore focus on measures that indicate success in those areas. We discussed a balanced approach above, and addressed some issues relying on survey results. Other types of measures and indicators need to be developed, however, and used in regular intervals to report progress<sup>iii</sup>. Ideally, the school would focus on consistency in the delivery methods (teacher training and ability to apply teaching through theme), and collecting supporting evidence that the method does what it is claimed to do. Some possibilities include comparative studies of children of different ages. Following children after they leave the school and documenting their progress would also be a valuable tool to document success of the educational approach taken in this school. Alumni surveys will do some of that, but a coordinated effort engaging all stakeholders is needed to devise appropriate measures and indicators.

It has been recognized (see Andersen et al 2001) that small organizations may lack resources to fully implement the BSC measures and indicators. However, they may value the initial process of discussion and consultation, providing an opportunity to share information and reflect on the organization's activities and clarifying strategic goals.

The focus school in our study has undergone this consultative process, and moved toward stakeholder surveys to measure progress. We find that the school has also benefited from the process, even though advances have occurred in stages, with various participants and varying degrees of success. In the process of stakeholder engagement around survey development and reporting the school has developed additional communication channels, responded to stakeholder suggestions and comments, engaged in strategic planning, and improved communications.

However, much remains to be accomplished, particularly on institutionalizing communication channels and stakeholder engagement. The ad hoc approach that worked reasonably well in a smaller school in the past is no longer sufficient. A move in a positive direction was the recent establishment of an Evaluation Committee of the Board. This committee is charged with developing and reporting on the results of the current and future stakeholder surveys. However, the mandate of the Evaluation Committee needs to be revisited on a regular basis in order to ensure currency and focus. This committee may provide the institutional support and memory needed to continue development of the balanced indicators and measures, assist with survey results and recommendations, and provide leadership in evaluating performance.

We also believe that a consistent set of measures needs to be developed to assist in the school's management and facilitate succession planning, both based on the survey data, and additional quantitative indicators of interest to stakeholders. Developing a BSC is viewed in the

literature as a potential vehicle for greater participation and empowerment of staff and members; it is said to extend beyond strategic management and assist with organizational change; and it can also evolve from a measurement to a management tool. The development of these measures should involve all stakeholder groups, as stakeholder engagement and an inclusive process that has been this school's hallmark<sup>iv</sup>.

Another aspect of the process of development of self-evaluation tools and methods using internally accepted, credible, mission-driven measures of performance is their potential for external impact. O'Neil et al., (1999) see the BSC as an opportunity to effect change from within and structure measures internally before they are externally imposed. In our context, the school may consider external accreditation at some point in the future. Therefore, developing its own measures that accurately reflect its mission and goals may serve a double role. Clarity about need for the particular multi-stakeholder governance structure it developed would also be beneficial in case of such an effort.

## **6. Concluding remarks**

We have discussed the process of development of performance measures for a school, which is a small, multi-stakeholder, democratic organization. Devising such measures in such an organization is a challenging and lengthy process that depends on the particular skill set of the volunteers engaged at different times. In addition to the lack of resources (including time), small democratic organizations face other challenges, such as leadership and vision to carry forward performance assessment tasks. Typically, decisions are ad hoc, with limited strategy, making it all the more difficult to undergo the process of organizational change. For the school in our study the need for organizational change resulted for the most part from its fast growth. Parents and teachers involved wanted to preserve organizational culture, while the school doubled in size.

In this paper, we described the process of development of stakeholder surveys, to be used for reporting about progress and responsiveness of the school as an organization to stakeholders' concerns over time. The dialogue between various stakeholders, in the spirit of devising balanced measures of performance, has been described in the paper with the goal to refine the mission of the organization, and communicate about the mission, the vision and interim goals that support it.

The balanced scorecard literature related to non-profit and small organizations, and to educational institutions in particular, addresses some relevant issues for our purposes. We

adopted the balanced accountability framework (Jones 2004) to illustrate some possibilities for consistent evaluation and reporting within that structure. School accountability to its stakeholders, we argue (in line with Jones), calls for reporting about student *and teacher* learning and opportunities to learn, addressing working and learning environment, responsiveness to stakeholder concerns, and ensuring organizational capacity for high levels of performance. An additional dimension must be stakeholder involvement, measured both by objective measures, as well as subjective views of organization's openness to receive input from all stakeholders.

For the school in our study, the key to meaningful evaluation and reporting of performance is turning to strategy and institutionalizing the main values that create its unique culture. The balanced approach is a natural fit, given this organizations mission, culture and values. A prolonged focus on the "bottom line" may negatively impact the values espoused by its members. The organization has made great strides towards this goal, but more needs to be done. In particular, concerted efforts are necessary to create a balanced report with the purpose to increase transparency with more open communication, and ensure long term member loyalty. The organization we described in this paper has been facing all the challenges of a small democratic organization engaged in devising its performance measures. However, democratic organizations can benefit from this process in the long run, since stakeholder engagement and ownership of particular processes, based on shared responsibilities, is important. Also important for the future shape of the organization is the slow process of building the institutional framework to support its mission.

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## Appendix

### X Parent Feedback Survey

The survey is designed to find out how well we are meeting the needs of students and families within X. As you will see it is also designed for you to complete the survey once for each child you have at the school. The reason for this is because, as you will notice below, some elements of the survey assess how well you feel your child is doing in the school. Your candid and honest responses will enable us to improve communication and programs for you and your child. It is not necessary to put your name on the form, however, if you would like to be contacted by a member of the board for a more in depth discussion, please put your name and phone number at the end of the form or send an email to [xxx@xxx.xx](mailto:xxx@xxx.xx). Also, please note your child's classroom(s) at the bottom of the survey.

For each of the questions below, please circle from **1** (strongly disagree) to **5** (strongly agree) that best represents your feelings for each of the following sections. In addition, please feel free to add any other comments on the space provided.

#### Overall Impression

		Disagree Strongly	Disagree	Neutral/ Unsure	Agree	Strongly Agree
1	The atmosphere at X is warm and nurturing	1	2	3	4	5
2	I feel comfortable leaving my child at X	1	2	3	4	5
3	I feel welcome to visit my child's classroom	1	2	3	4	5
4	The teachers and staff are enthusiastic about working here	1	2	3	4	5
5	If I have any concerns about my child, I know where to go with my concerns	1	2	3	4	5
6	I feel confident any concerns I have will be addressed promptly and respectfully	1	2	3	4	5
7	My child's teachers know and care about my child	1	2	3	4	5
8	My child's teachers respond to my child's individual needs	1	2	3	4	5
9	The teachers and staff at X are friendly	1	2	3	4	5

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

#### Parent-Teacher Interactions

		Disagree Strongly	Disagree	Neutral/ Unsure	Agree	Strongly Agree
1	I have received adequate information about programs and curriculum.	1	2	3	4	5
2	I have received adequate information about policies and procedures	1	2	3	4	5
3	I have found parent-teacher meetings useful	1	2	3	4	5
4	I would like more opportunities to meet with my child's teacher	1	2	3	4	5
5	I have a variety of opportunities to participate in the school	1	2	3	4	5
6	I am regularly informed about my child's behaviour at school	1	2	3	4	5
7	I am regularly informed about my child's academic development	1	2	3	4	5
8	I am regularly informed about my child's social development	1	2	3	4	5
9	I am satisfied with how information about my child is communicated to me by the teachers	1	2	3	4	5
10	The self-assessment my child completed in Middle School was useful	1	2	3	4	5
11	Middle School reports are helpful in understanding my child's progress	1	2	3	4	5

Comments: \_\_\_\_\_

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**Curriculum Content**

		Disagree Strongly	Disagree	Neutral/ Unsure	Agree	Strongly Agree
1	Overall, the curriculum is age appropriate for the children	1	2	3	4	5

2	I believe my child finds the material interesting	1	2	3	4	5
3	Overall, the curriculum is sufficiently challenging for my child	1	2	3	4	5
4	Overall, the theme approach is appropriate for my child	1	2	3	4	5
5	My child's reading skills are progressing appropriately	1	2	3	4	5
6	My child's math skills are progressing appropriately	1	2	3	4	5
7	My child's writing skills are progressing appropriately	1	2	3	4	5
8	My child's French skills are progressing appropriately	1	2	3	4	5
9	My child's music skills are progressing appropriately	1	2	3	4	5
10	My child is learning critical thinking skills	1	2	3	4	5
11	My child is learning research skills	1	2	3	4	5
12	I know the grade appropriate learning benchmarks for my child	1	2	3	4	5
13	I understand how theme based learning works	1	2	3	4	5
14	I think my child should get less homework	1	2	3	4	5
15	My child gets appropriate feedback on His/her homework	1	2	3	4	5
16	I frequently help my child with His/her homework	1	2	3	4	5
17	I know what I should be doing to help my child with His/her homework	1	2	3	4	5
18	I think my child should get more homework	1	2	3	4	5
19	The gym program is adequate	1	2	3	4	5
12	The field trips are useful	1	2	3	4	5

**PLEASE LET US KNOW IF THERE ARE ANY ISSUES THAT NEED TO BE ADDRESSED**

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**ARE THERE ARE ANY OTHER TOPICS YOU FEEL SHOULD BE INCORPRATED INTO THE CURRICULUM?**

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**Classrooms & Outdoor Environment**

		Disagree Strongly	Disagree	Neutral/ Unsure	Agree	Strongly Agree
1	The classrooms at the school are appealing	1	2	3	4	5
2	The classrooms meet the needs of children	1	2	3	4	5
3	Supplies and equipment are adequate	1	2	3	4	5
4	The classrooms are kept clean	1	2	3	4	5
5	I am comfortable with how rules for behaviour in class are set for my child	1	2	3	4	5
6	The playgrounds meet the needs of children	1	2	3	4	5
7	The playground equipment is adequate	1	2	3	4	5
8	The playgrounds are kept safe	1	2	3	4	5
9	The playgrounds at the school are appealing	1	2	3	4	5
10	The social interactions on the playground are well monitored	1	2	3	4	5
11	Staff are proactive at handling playground disputes	1	2	3	4	5

Comments: \_\_\_\_\_

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### **X Administration and Board of Governors**

		Disagree Strongly	Disagree	Neutral/ Unsure	Agree	Strongly Agree
1	I know people who sit in the board	1	2	3	4	5
2	The Head Teacher is accessible to me	1	2	3	4	5
3	If I have a concern for the board, I know how to communicate it to them	1	2	3	4	5
4	I know the mandate of the X board	1	2	3	4	5
5	I am usually able to attend the Annual General Meeting	1	2	3	4	5
6	I find the Annual General Meeting useful	1	2	3	4	5
7	The board and committees communicate their decisions well	1	2	3	4	5
8	I find the X website useful and easy to navigate (please specify)	1	2	3	4	5

Comments: \_\_\_\_\_

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### Your Child and the School

		Disagree Strongly	Disagree	Neutral/ Unsure	Agree	Strongly Agree
1	My child is happy at X	1	2	3	4	5
2	My child enjoys his/her time at X	1	2	3	4	5
3	In the morning, my child wants to come to the school	1	2	3	4	5
4	My child likes the other kids at X	1	2	3	4	5
5	My child likes his/her teachers	1	2	3	4	5
6	My child is willing to speak up for him/herself	1	2	3	4	5
7	My child has benefited from his/her time at X	1	2	3	4	5
8	Overall, the X experience enhances my child's self-esteem	1	2	3	4	5
9	My child has benefited from the multi-aged interactions at X (e.g., plays, book buddies)	1	2	3	4	5
10	My child has benefited from being in multi-grade classes	1	2	3	4	5

Comments: \_\_\_\_\_

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### Before/After-School Programs

		Disagree Strongly	Disagree	Neutral/ Unsure	Agree	Strongly Agree	Not Applicable
1	I know what happens in the before/after school program	1	2	3	4	5	N/A
2	I believe my child enjoys the before/after school program	1	2	3	4	5	N/A
3	I am comfortable with the way rules for behaviour are set for my child in the before/after school program	1	2	3	4	5	N/A
4	The activities in the before/after school program are appropriate for my child	1	2	3	4	5	N/A
5	I believe the before/after school program staff are competent	1	2	3	4	5	N/A
6	The staff are engaged with the children in the after-school program	1	2	3	4	5	N/A
7	The snacks served in the program is nutritious	1	2	3	4	5	N/A

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Other Programs and Activities**

		Disagree Strongly	Disagree	Neutral/ Unsure	Agree	Strongly Agree	Not Applicable
1	The meals and snacks served at the school are nutritious	1	2	3	4	5	N/A
2	There is enough choice in the clubs for my child	1	2	3	4	5	N/A
3	I am happy with the swim program	1	2	3	4	5	N/A
4	My child enjoys the swim program	1	2	3	4	5	N/A
5	The community involvement opportunities (e.g., Terry Fox Run; other charities) benefit my child	1	2	3	4	5	N/A
6	My child enjoys the special trips (3-day trips, Quebec trip).	1	2	3	4	5	N/A
7	My child benefits from the special trips (3-day trips, Quebec trip).	1	2	3	4	5	N/A
8	My child enjoys the Middle School enrichment activities (e.g., photography, cooking)	1	2	3	4	5	N/A
9	My child benefits from the Middle School enrichment activities (e.g., photography, cooking)	1	2	3	4	5	N/A

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Do you understand the “vision” of the school? (Yes/No). What do you think the “vision” of the school is?

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

\_\_\_\_\_ X has grown in size and grade levels in the last several years. How well do you think the school has adapted to this change?

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If you could change any element of the school atmosphere or environment, what would it be?

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If you could change any element of the curriculum what would it be?

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If you could add one more question to this survey what would it be? How would you answer it?

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Child's Classroom: \_\_\_\_\_

### X: Staff Feedback Survey

This questionnaire is designed to find out how well we are meeting the needs and expectations of the teachers within X. Your candid and honest responses will enable us to improve communication and conditions for you at the school. Please do not put any identifying information anywhere on the survey – this survey is meant to be completely anonymous. However, if there is anything in this survey that prompts you to want a direct response to a concern, please communicate your concern to [xxx@xxx.ca](mailto:xxx@xxx.ca) and you get a response. However, we would like you to please indicate which age group you teach: Pre-Primary (check box) Primary (check box) or middle school (Check box).

For each of the questions below, please select the appropriate answer from the options provided. In addition, please feel free to add any other comments on the spaces provided.

#### Overall Impression

		Disagree Strongly	Disagree	Neutral/ Unsure	Agree	Strongly Agree
1	The atmosphere at X is warm and nurturing for the children	1	2	3	4	5
2	I am happy to be working at X	1	2	3	4	5
3	The teachers and staff at X are friendly	1	2	3	4	5
4	The teachers are enthusiastic about working here	1	2	3	4	5
5	The parents are supportive and helpful	1	2	3	4	5
6	The school is clean and well maintained	1	2	3	4	5
7	I expect that I will be working at X in 1 year	1	2	3	4	5
8	I expect that I will be working at X in 5 years	1	2	3	4	5

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

#### Parent-Teacher Interactions

		Disagree Strongly	Disagree	Neutral/ Unsure	Agree	Strongly Agree
1	I have a variety of opportunities to meet the parents of the children I teach	1	2	3	4	5
2	Parent-teacher meetings are useful	1	2	3	4	5
3	I would like more scheduled opportunities to meet with the parents of the students I teach	1	2	3	4	5
4	The parents of the children I teach are involved in their education	1	2	3	4	5
5	I get support from the administration (e.g., Head Teacher, Heads of Department) in dealing with parents					
6	The parents of the children I teach need to be more involved with their child's education	1	2	3	4	5
7	The parents of the students I teach are aware of the teaching philosophy at X	1	2	3	4	5
8	The parents of the students I teach are supportive of the teaching philosophy at X	1	2	3	4	5
9	It is important to me that parents feel comfortable discussing their concerns about their children's schooling with me directly.	1	2	3	4	5
10	The parents of my students are supportive of my approach to the curriculum.	1	2	3	4	5

Comments: \_\_\_\_\_

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### Job Aspects and Professional Development

		Disagree Strongly	Disagree	Neutral/ Unsure	Agree	Strongly Agree
1	Teacher salaries at X are adequate	1	2	3	4	5
2	I feel my job is secure	1	2	3	4	5
3	Our benefits plan is sufficient	1	2	3	4	5
4	X supports me in my professional development	1	2	3	4	5
5	I would like more opportunities for professional development	1	2	3	4	5
6	The professional development opportunities provide by X are appropriate for me	1	2	3	4	5
7	The supplies and equipment available to the teachers are adequate	1	2	3	4	5
8	My job description is clear	1	2	3	4	5
9	I frequently do things that are outside my job description	1	2	3	4	5
10	I am comfortable doing things outside my job description	1	2	3	4	5
11	I am asked to do too many volunteer activities at the school	1	2	3	4	5
12	I have input into the school curriculum	1	2	3	4	5
13	I feel I have enough input into the school curriculum	1	2	3	4	5
14	I am asked for my input into decision-making at the school	1	2	3	4	5
15	My input is valued at X	1	2	3	4	5
16	I feel there are enough career advancement opportunities for me at X	1	2	3	4	5
17	I work too many hours at my job	1	2	3	4	5
18	The pension plan is sufficient	1	2	3	4	5
19	Committees are a vital part of X	1	2	3	4	5
20	Teachers should have representation on all X committees	1	2	3	4	5

Approximately how many hours do you work per week? \_\_\_\_\_

Comments:

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### Communication and Leadership

		Disagree Strongly	Disagree	Neutral/ Unsure	Agree	Strongly Agree
1	I feel that my work is supported by my Head of Department	1	2	3	4	5
2	I feel my work is supported by the other teachers at the school	1	2	3	4	5
3	I feel that X has a very collegial	1	2	3	4	5

	atmosphere					
4	Conflicts between teachers are dealt with effectively	1	2	3	4	5
5	If there is a disagreement between a teacher and a Head of Department, it is dealt with effectively	1	2	3	4	5
6	I think the teachers in the school have good relationships with each other	1	2	3	4	5
7	If I have any concerns about my job, I know where to go with my concerns	1	2	3	4	5
8	I feel confident any concerns I have will be addressed promptly and respectfully	1	2	3	4	5
9	Administrative decisions are communicated to us promptly	1	2	3	4	5
10	I feel that my work is supported by the Head Teacher	1	2	3	4	5
11	The assistance I receive from the support staff helps me do my job	1	2	3	4	5

Comments: \_\_\_\_\_

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### X Administration and Board of Directors

		Disagree Strongly	Disagree	Neutral/ Unsure	Agree	Strongly Agree
1	I know people who sit on the board	1	2	3	4	5
2	The Head Teacher is accessible to me	1	2	3	4	5
3	If I have a concern for the board, I know how to communicate it to them	1	2	3	4	5
4	I know the mandate of the X board	1	2	3	4	5
5	I am usually able to attend the Annual General Meeting	1	2	3	4	5
6	I find the Annual General Meeting useful	1	2	3	4	5
7	The board should do more (please specify below)	1	2	3	4	5
8	The Personnel Committee has been helpful in addressing staff concerns	1	2	3	4	5

Comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Evaluation and Assessment

		Disagree Strongly	Disagree	Neutral/ Unsure	Agree	Strongly Agree
1	Teachers are regularly assessed at X	1	2	3	4	5
2	I feel peer teaching evaluations are useful	1	2	3	4	5
3	I feel Head of Department teaching evaluations are useful	1	2	3	4	5
4	Teacher assessments should be done more often	1	2	3	4	5
5	Teacher assessments should be done less often	1	2	3	4	5
6	I find that the assessments are conducted in a consistent manner	1	2	3	4	5
7	I feel the assessments are fair	1	2	3	4	5
8	I believe teachers should assess other teachers	1	2	3	4	5
9	I believe the Head Teacher should assess the teachers	1	2	3	4	5
10	I believe that the Board should do teacher assessments	1	2	3	4	5
11	Teachers get enough support (e.g., time) to perform the peer evaluations	1	2	3	4	5
12	I get sufficient feedback from the administration about my performance	1	2	3	4	5
13	Teachers should assess the Heads of Department	1	2	3	4	5
14	Teachers should assess the Board	1	2	3	4	5
15	I feel the mentoring program is useful	1	2	3	4	5
16	Teachers should assess the Head Teacher	1	2	3	4	5

Comments: \_\_\_\_\_

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### Clubs and Other Activities

1	I feel the before and after school programs are good	1	2	3	4	5
2	I believe that the before and after school programs should be evaluated regularly	1	2	3	4	5
3	I find the clubs are useful for the children	1	2	3	4	5
4	I spend too much time involved in clubs	1	2	3	4	5
5	The before/after school monitors are adequately paid	1	2	3	4	5
6	The before/after school staff have good leadership	1	2	3	4	5
7	The before/after school monitors get adequate support from the administration	1	2	3	4	5
8	The before/after school staff get appropriate feedback from parents and administration	1	2	3	4	5

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Do you understand the “vision” of the school? (Yes/No). What do you think the “vision” of the school is?  
\_\_\_\_\_  
\_\_\_\_\_

X has grown in size and grade levels in the last several years. How well do you think the school has adapted to this change?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If you could change any element of the school, or the atmosphere, what would it be?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If you could change any element of the curriculum what would it be?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If you could add one more question to this survey what would it be? How would you answer it?

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### X: Alumni Feedback Survey

Thank you for taking the time to fill out this survey. THIS survey is designed to find out how well we are meeting the needs of students and families within X. One of the important ways to determine this is to ask our former students (who may now be in High School or even University) how well prepared they feel after they have left X. Some elements of the survey assess how well you feel you are doing in school now, as well as how well you're X experience prepared you for your current school. Your candid and honest responses will enable us to improve programs for future X students. It is not necessary to put your name on the form, however, if you would like to be contacted by a member of the board for a more in depth discussion, please put your name and phone number at the end of the form or send an email to [XSurveysAdmin@gmail.com](mailto:XSurveysAdmin@gmail.com).

For each of the questions below, please circle from **1** (strongly disagree) to **5** (strongly agree) that best represents your feelings for each of the following sections. In addition, please feel free to add any other comments on the space provided.

#### Overall Adjustment to High School

		Disagree Strongly	Disagree	Neutral/ Unsure	Agree	Strongly Agree
1	I found it easy to make new friends in High School	1	2	3	4	5
2	Overall, I am happy at my school	1	2	3	4	5
3	I have found the tests in my current school to be difficult	1	2	3	4	5
4	I feel the education at X prepared me well for tests in High School.	1	2	3	4	5
5	I feel I have done well on my tests	1	2	3	4	5
6	I felt well prepared for the math curriculum in High School	1	2	3	4	5
7	I felt well prepared for the Reading/Language curriculum in High School	1	2	3	4	5
8	I felt well prepared for the Social Studies curriculum in my current school	1	2	3	4	5
9	I felt well prepared for the Science curriculum in High School	1	2	3	4	5
10	I feel I was as well prepared for High School as kids from public schools	1	2	3	4	5
11	I feel I was as well prepared for High School as kids from private schools	1	2	3	4	5

How many years were you a student at X? \_\_\_\_\_

What is currently your **strongest** subject in school?

\_\_\_\_\_

What is currently your **weakest** subject in school?

\_\_\_\_\_

Please tell us how easy or difficult you found the transition from X to another school to be.

Were you able to do what you wanted to do? Why or why not?

\_\_\_\_\_  
\_\_\_\_\_

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Please feel free to add any comments you may have:

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**Your Perceptions of X**

		Disagree Strongly	Disagree	Neutral/ Unsure	Agree	Strongly Agree
1	The teachers at X are <b>more</b> enthusiastic than teachers in High School	1	2	3	4	5
2	My teachers at X knew and cared about me <b>less</b> than my current teachers	1	2	3	4	5
3	My teachers at X responded to my individual needs <b>more</b> than my current teachers	1	2	3	4	5
4	I found teachers at X <b>more</b> friendly than my current teachers	1	2	3	4	5
5	I found the staff at X to be <b>less</b> caring than my current teachers	1	2	3	4	5
6	There are more rules at my current school than there was at X	1	2	3	4	5
7	The students in High School break school rules more than the students at X did.	1	2	3	4	5

**X Curriculum Content**

		Disagree Strongly	Disagree	Neutral/ Unsure	Agree	Strongly Agree
2	I found the material covered at X interesting	1	2	3	4	5
3	Overall, I found that the theme approach to teaching worked for me	1	2	3	4	5
4	The X Curriculum prepared me for the <b>math</b> courses I am currently doing	1	2	3	4	5
5	The X Curriculum prepared me for the <b>English</b> courses I am currently doing	1	2	3	4	5
6	The X Curriculum prepared me for the <b>French</b> courses I am currently doing	1	2	3	4	5
7	The X Curriculum prepared me for the <b>Social Studies</b> courses I am currently doing	1	2	3	4	5
8	The X Curriculum prepared me for the <b>Music</b> courses I am currently doing	1	2	3	4	5
9	The X Curriculum prepared me for the <b>Science</b> courses I am currently doing	1	2	3	4	5
10	At X I learned critical thinking skills	1	2	3	4	5
11	The homework I did at X prepared me for the level of homework I do now	1	2	3	4	5
12	I found that we had enough sports/physical education at X.	1	2	3	4	5

Are you currently enrolled in a French Immersion programme?      YES   NO   (circle one)

Are there any other topics that you feel should be incorporated into the X curriculum? (Please specify)

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### What are you doing now?

What do you usually do over the summer? (e.g., employment, community involvement, volunteer work, etc.)

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What extracurricular activities do you do (in and/or out of school) during the school year?  
(e.g., clubs, bands, sports, employment, community involvement, volunteer work, etc.)

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Is there anything you miss about X?

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Is there anything that your current school has that you did not have at X?

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If you make any suggestion for how to prepare X students for High School, what would it be?

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If you could add one more question to this survey what would it be? How would you answer it?

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What was your average grade over the last year? \_\_\_\_\_

Have you won any awards or been recognized for any achievements? If yes, please specify

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Are you planning on going to University?      YES   NO   MAYBE      (Circle one)

Please feel free to add any comments you may have:

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## Endnotes

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<sup>i</sup> Approximately 80% of the public teacher salary at the time of the project. The Board's goal of achieving 90% of public school salaries has recently been achieved.

<sup>ii</sup> Teachers often express that parents commitment to the school is insufficient, while parents may be unaware of the long hours teachers spend at the school. Tracking volunteer hours may explain some of these trends.

<sup>iii</sup> This could become a part of the Head teacher's report, for example.

<sup>iv</sup> The school has in the recent past examined the terms of reference of its committees. Historically, all committees have been open to all members, but more recently some were defined as Committees of the Board for functional reasons. This may require re-examination by parents and teachers, as this openness

## SES/ESD Network Research Goals

- . Contributing to the theory and practice of social economy in the Atlantic region
- . Internal bridging, bonding, mentoring & capacity building
- . Encouraging use of the “social economy” as a framing concept in the region
- . Linking Atlantic partners with other parts of Canada and the world

## SES/ESD Network Research Themes and Questions

### *Conceptualizing & describing the social economy in Atlantic Canada*

- . What does the social economy look like? What needs does it address?
- . How can we best capture this sector conceptually?
- . What, if anything, makes it distinctive or innovative? How interconnected are its facets, & to what effect?
- . What are the characteristics of social economy organizations?
- . What are the implications for government policy?

### *Policy inventory and analysis*

- . How are different understandings of “social economy” reflected in government policy?
- . What needs are not being met, & what changes are needed in regulatory environment?
- . What indicators can we develop to aid in policy development?

### *Community mobilization around issues of common concern (natural resources; food security; inclusion and empowerment)*

- . Do social economy organizations contribute to social inclusion, the democratization of the economy, & empowerment?
- . What inputs are needed to overcome obstacles & build capacity?
- . What can we learn from research on mobilization around food security, empowerment & inclusion, community management of natural resources & energy?

### *Measuring and Financing the Social Economy*

- . What can social accounting, co-operative accounting, social auditing, & other techniques contribute towards a better understanding of the work and contributions of social economy organizations?
- . Where do social economy organizations obtain the financing that they need?
- . What do social economy organizations contribute toward financing the social economy?

### *Modeling & researching innovative, traditional, & IT-based communication and dissemination processes*

- . How can social economy actors best communicate?
- . What can our Network team members contribute by developing & modeling processes and techniques?
- . What can be gained from exploring technology as an equalizer vs. technology as a barrier?



**Social Economy and Sustainability Research Network**  
**Partenariat sur l'économie sociale et la durabilité**  
Bridging, Bonding, and Building | Renforcement des liens et des capacités

## **Network Director:**

Dr. Leslie Brown, Professor, Sociology/Anthropology, Mount Saint Vincent University

## **Network Co-Directors:**

- . Mr. Seth Asimakos, Manager, Saint John Community Loan Fund
- . Ms. Penelope Rowe, Chief Executive Officer, Community Services Council Newfoundland and Labrador
- . Dr. Luc Thériault, Professor, Sociology, University of New Brunswick

## **Sub-node Coordinators:**

- . SN1: Mapping and Policy Analysis  
Dr. Luc Thériault, Professor, Sociology, University of New Brunswick, Fredericton, NB
- . SN2: Mobilization : Inclusion and Empowerment in the Social Economy  
Dr. Irené Novaczek, Director, Institute of Island Studies, University of Prince Edward Island, Charlottetown, PEI
- . SN3: Mobilization : Food Security and Community Economic Development  
Dr. Patricia Williams, Assistant Professor, Applied Human Nutrition, Mount Saint Vincent University, Halifax, NS
- . SN4: Mobilization : Natural Resources and Livelihood  
Dr. Omer Chouinard, Professeur, Sociologie, Université de Moncton, Moncton, NB
- . SN5: Financing and Measuring the Social Economy  
Dr. Sonja Novkovic, Associate Professor, Economics; and Dr. Judith Haiven, Associate Professor, Management, Saint Mary's University, Halifax, NS
- . SN6: Communication Practices and Tools  
Ms. Penelope Rowe, Chief Executive Officer, Community Services Council Newfoundland and Labrador, St. John's, NL; and  
Dr. Ivan Emke, Associate Professor, Social/Cultural Studies, Sir Wilfred Grenfell College, Memorial University of Newfoundland, Corner Brook, NL

## **Network Coordinator:**

Noreen Millar, M.A.

This working paper has been produced with technical assistance from Megan MacDonald, Communications Assistant/ CAP-YI Intern

<http://www.msvu.ca/socialconomyatlanticntic/>

A multiple partner, Atlantic-wide research project | Un partenariat de recherche au Canada atlantique

## Working Paper Feedback

A. Please let us know what you found helpful in this Working Paper.

Include Paper # \_\_\_\_\_

B. How could the Working Paper Series be improved?

C. Is there anything that needs to be changed in this Working Paper?

D. Your name and contact info (optional)

### **Send to:**

Noreen Millar, Network Coordinator  
c/o Research House, Mount Saint Vincent University  
Halifax Nova Scotia B3M 2J6 Canada  
Tel: 902-457-6748 Fax: 902-457-5547  
E-mail: [seproject@msvu.ca](mailto:seproject@msvu.ca)