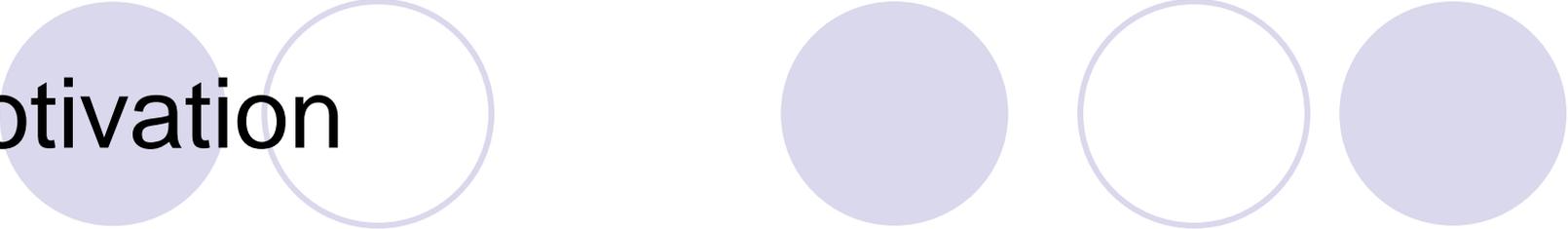


Evaluating performance of small social-economy organizations: An independent school

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ISTR-EMES 2008
Barcelona, July 9-12



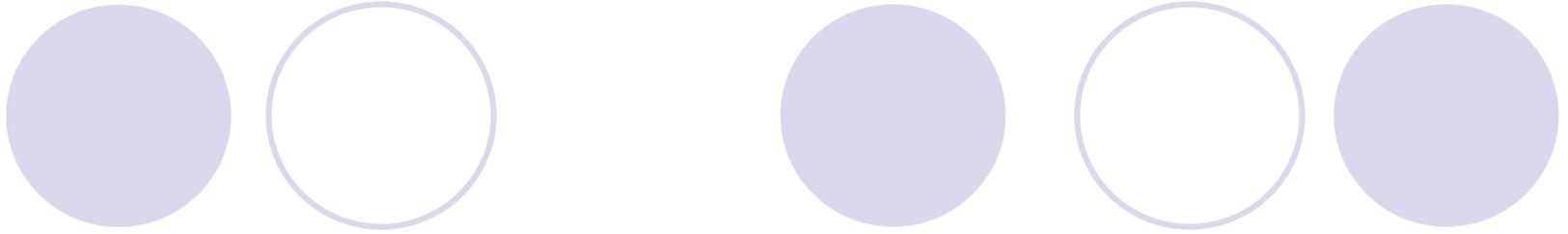
Motivation



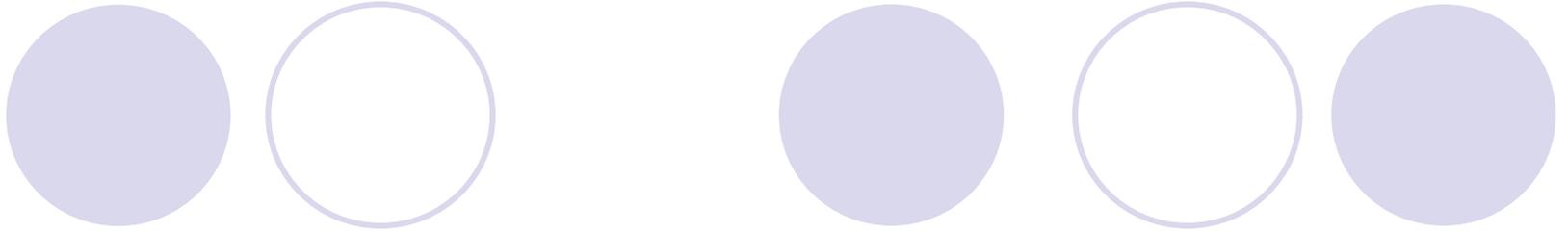
- A joint research project in the social economy between a community partner (an independent school) and academic partners.
- The school is a democratic organization, run by teachers and parents.
- Goal: to find ways to improve communication and reporting about general performance of the school.
- Challenges:
 - how to measure performance, while maintaining organization's unique characteristics, both from the organizational perspective and its approach to elementary education.
 - members may not have the right organizational knowledge and training
 - the organization often moves forward on a trial and error basis, relying on member experiences, networks and efforts.
 - Small size of the organization brings additional challenges (conflicts of interest; criticism taken personally; different personalities; etc..)

Measuring performance of schools

- Performance measurement in schools is often linked to discussions on how to improve student performance.
- Emphasis on a top down approach
- measures often defined by external regulatory bodies and centering on assessing student achievement, typically through formal testing.
- Linked to student performance, there has been some interest in assessing teachers' performance, at least partly on the basis of their students' achievements.
 - Re-emergence of performance related pay for teachers



- Our interest is in taking a wider perspective on performance;
- considering the multi-stakeholder nature of the organization;
- seeking to explore the potential for developing performance measurement tools at the individual organization level and with the participation of key stakeholders.
- Our goal:
 - Not to ignore student achievement, but emphasize the different meanings of achievement to different stakeholders (instead of rely on the standardized testing tools).
 - 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 (BSC) approach

- Kaplan & Norton 1992, 1996;
- BSC assumes that financial performance measures on their own, while essential, need to be balanced by other perspectives.
- To financial measures, it adds measures in relation to: customers; internal processes; and learning and growth.
- One appeal of the process of developing, implementing and using the BSC = it provides opportunities for involving a wider range of people in decision-making

BSC and non-profit organizations

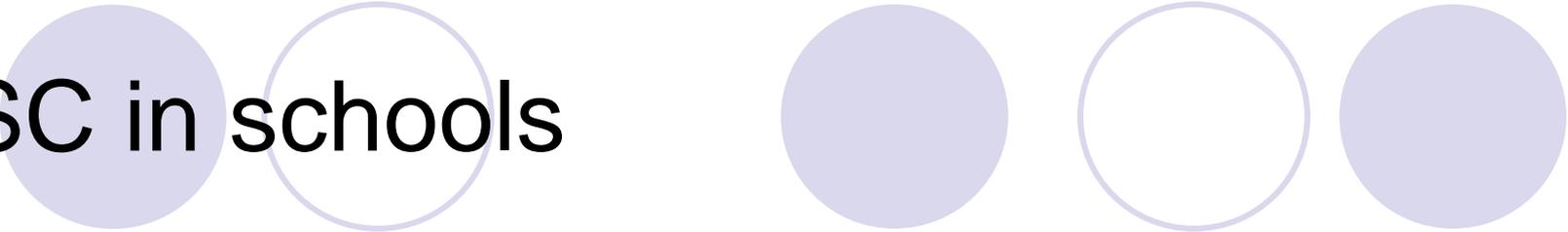
- In non-profit organizations context the customer perspective may be placed at the top of the BSC, moving finance from its preeminent spot
- Non-profits can place their overarching mission objective at the top of their scorecard as well, since the mission represents their reason for existing and their point of accountability with society.
- the value of BSC:
 - communicating to all levels of the organization
 - clarifying strategic thinking.
 - Numerous other case studies also indicate the differing levels of intensity of use and integration of the BSC

BSC in Small organizations



- Various case studies indicate the differing levels of intensity of use and integration of the BSC in planning and decisionmaking
- 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
- Small organizations face limited resources but also have much closer involvement of decision makers to the day to day activities of the organisation (reducing the need for the range of performance data required in larger organizations).

BSC in schools



- Literature emphasizes:
 - The need to strike a balance between the various interests of stakeholders
 - avoiding too narrow a focus on market measures (such as enrolment and finance)
 - supporting 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.

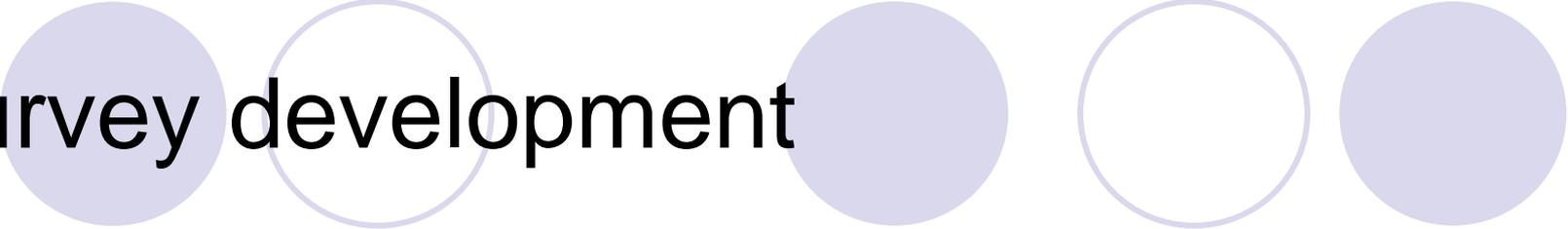
The balanced accountability approach

- 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.
- 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

The school-focus of our research

- 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 in grades K-7
 - 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 for management and governance.
- Strategic planning for the school has typically been haphazard.
- Fast growth impeded transparency, so the Board of directors engaged in discussions about performance evaluation and effective communication within the school.

Survey development



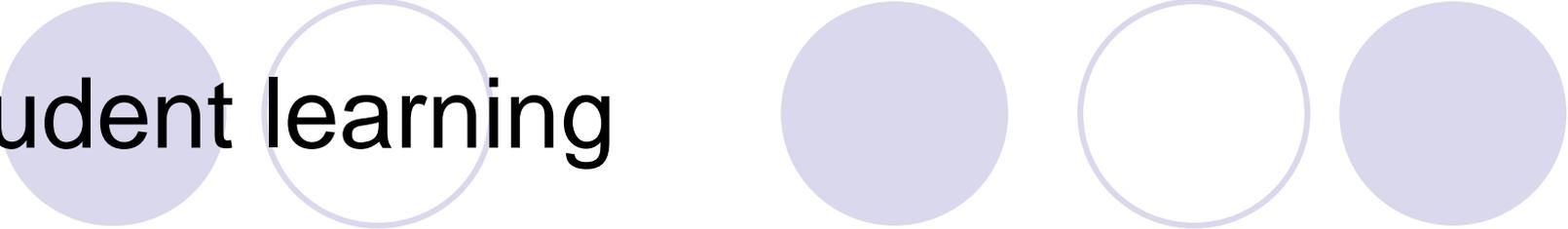
- A two-fold approach was taken: 1-the school would engage in data collection and decisions about appropriate indicators and 2-both quantitative and qualitative measures would be produced in the form of survey instruments for the stakeholder groups.
- Stakeholders were identified to be teachers, parents, 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.
- Survey development
 - 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.
 - 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.
 - 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.



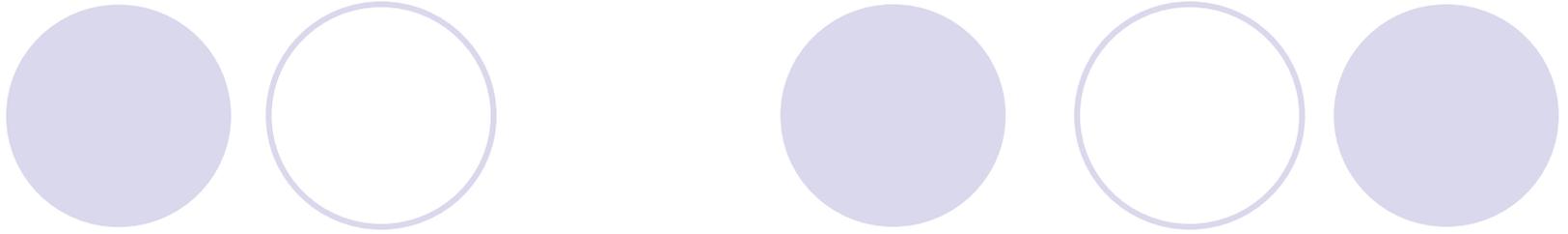
The balanced accountability argument

- 1) student learning;
- 2) opportunity to learn;
- 3) responsiveness to students, parents, and community; and
- 4) organizational capacity for improvement.

Student learning



- Theme based learning
 - All of the subjects in the school are included within an underlying theme (changing each school year). This links the subjects together and allows them to be taught in a fluid and connected fashion.
- Teachers report on students' progress through ongoing communication with parents facilitated through small class sizes.
- 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.
- 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”
- 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



- Survey results indicate that opportunities for professional development were somewhat limited.
- Because of the school's unconventional approach, relevant learning opportunities were also rare.
- Need clarity about the *use* of evaluation methods other than (or complementary to) standardized testing.
- The second part is *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.
- Objective measures are lacking in this case

Opportunity to learn

