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## MANAGING TO OUTCOMES IN AN ERA OF SCARCITY

### What It Takes

Building a Performance-Management System  
to Support Students and Teachers

by Patricia Brantley

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An essay from the book *Leap of Reason*,  
which is available in full at [leapofreason.org](http://leapofreason.org)

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# What It Takes

## Building a Performance-Management System to Support Students and Teachers

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At [Friendship Public Charter School](#), we have not shied from controversy in pursuit of better outcomes for our students. Friendship manages four traditional public schools and six public charter schools in Washington, DC, and Baltimore, MD. When Michelle Rhee was chancellor of the [DC Public Schools](#), we partnered with her to turn around DC's most troubled high school, Anacostia Senior High. When Rhee launched one of the country's first performance-based evaluation processes for unionized teachers, Friendship had the distinction of managing these teachers at Anacostia. The media interest in these efforts and in Rhee's pathbreaking partnership with a charter-school operator was unprecedented.

While in general the media have done a good job of explaining why we, the school district, and others are working to use data in much more comprehensive ways (including for evaluating teachers), the media have done very little to illustrate the *how*. In this essay I will try to complete the picture. I'll describe the hard work that has gone into collecting, using, and communicating the data we need in order to assess teachers fairly and support their development in the classroom, and I'll share insights on how we have used these data to engage students and parents more deeply than ever before—a process that has yielded concrete results for our students.

## Were We Focusing on the Right Things?

In the 2007–08 school year, Friendship engaged [McKinsey & Company](#) to help us design a performance-management system to put mission-critical information in the hands not only of administrators like me but also teachers, parents, and students themselves. A brief note about McKinsey is in order. We feel fortunate to have had the support of such a top-notch firm, and I can't say enough about the smart and caring individuals assigned to our project. But if you don't have the budget to engage a firm like McKinsey, that's fine. There are many consultants with the ability to help you focus, be deliberate, and get results.

The process our consultants organized gave me and other Friendship leaders the opportunity to take a hard, unflinching look at just how focused on performance we really were as leaders and to do the same with each of our staff members. We are all about hard work at Friendship—putting in long hours, constantly working through weekends and holidays. The process with the consultants helped us determine whether all that hard work was smart work. In other words, were we focusing on the right things?

In Friendship's early years, our focus on ensuring the right inputs, such as making sure we had strong teachers and curricula, yielded significant gains for our students. The first Friendship campuses achieved noteworthy performance gains at all grade levels. We widely celebrated our success and began an aggressive expansion strategy. Soon, however, we recognized that performance had begun to flatline. Our schools were still outperforming their peers, but the peaks weren't as high as we had expected. We responded to the flatlining by driving our staff to put in even more time. The exhaustion was becoming apparent—and the results weren't going in the direction we wanted. It was time to call in outside help.

For me, the opportunity to be introspective about our performance meant not just considering the inputs but truly knowing how well those inputs mapped to the outcomes we desired for our students. Further, it gave us a chance to better understand

how changing various inputs would yield greater or worse performance—and tie that performance specifically to each person’s efforts.

### **Identifying What Was Worth Measuring**

We began the process with McKinsey by identifying the most important “drivers” for delivering on our aspirations for the students who entrust their education to us. At one of our first meetings, we gathered several hundred teachers in our middle school cafeteria to solicit their input on the drivers of success. As any student or parent will tell you, Friendship teachers are warm and welcoming. However, on this particular day, their trepidation was obvious. Teachers had heard that school administrators were going to develop a performance system, but we weren’t clear enough with the teachers that they would have an opportunity to guide the work.

A simple, direct question broke the tension in the room: “In your opinion, what’s the most important driver?” Soon the conversation was flowing, and we found significant common ground.

After three months of meetings, we arrived at these four drivers:

- Excellent teaching and learning opportunities
- Outstanding leadership teams
- An environment conducive to learning
- Organizational strength and long-term viability.

To make these drivers more than just nice platitudes, we spent the next three months identifying fifteen essential “sub-drivers” and over three hundred key “performance indicators.” Figure 1 shows how this worked for a sub-driver of the “Excellent teaching and learning opportunities” driver.

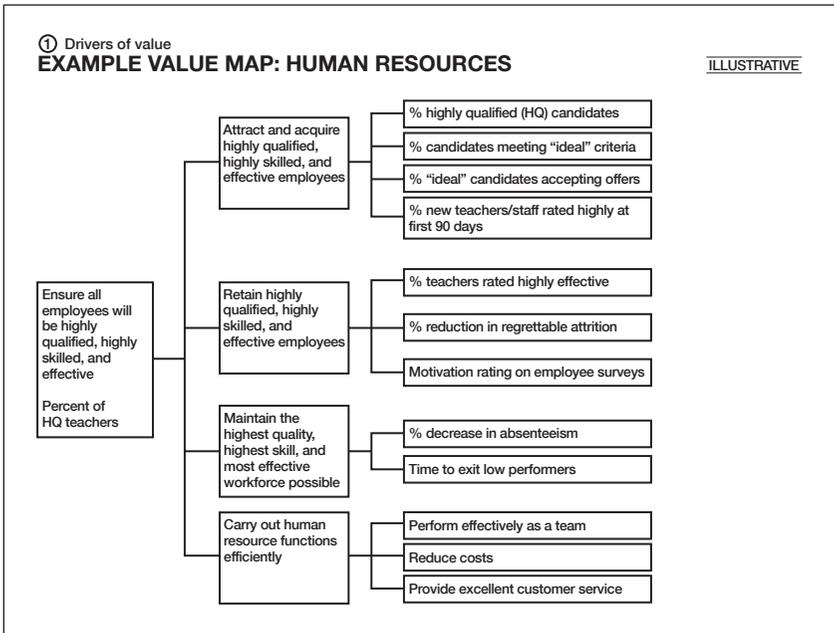


Figure 1: Example Value Map

Arriving at the sub-drivers and indicators was a difficult process and required many hours of internal debate. We assembled a dozen ad hoc teams to help. On each team we carefully placed an “agitator” who would challenge the group by asking, “So what?”

As inclusive as the process was, we didn’t always get it right. Just when we were starting to feel good about where we had landed, we discovered we’d missed a critical element: whether the indicators were measurable. As we moved to designing the framework to track sub-drivers and key performance indicators, we found that 15 percent of our indicators were either impossible or impractical to measure.

We made the difficult decision to drop unmeasurable indicators if we could not find a suitable substitute.

## Key Lessons From Our Schools

After identifying what mattered—that is, the information worth measuring—we turned to figuring out how to change the culture within our ten schools to collect and then make good use of this information.

At the risk of sounding pedantic, I'd like to offer a few of the key lessons we learned from this hard but transformative work. I don't have the room to give a comprehensive list of our lessons, but these were among the most critical.

**Lesson One: Build the system to put the data in the hands of the classroom teacher.** When presented clearly and consistently, data can empower teachers and provide them with the information necessary to drive academic results in their classrooms. To do this at Friendship, we needed to expand the amount of data available to these key end users in real time and organize the data set in a way that would allow teachers to interpret it in rapid and actionable ways.

With the help of an illustration, I'll describe what that looked like for us. We started with the premise that we didn't want to force our teachers to use two different software platforms. We already had student information systems in the classroom, which helped teachers track attendance, behavior, and grades on assignments. On top of this system we built a series of customized dashboards that allow teachers to do much more than they could previously.

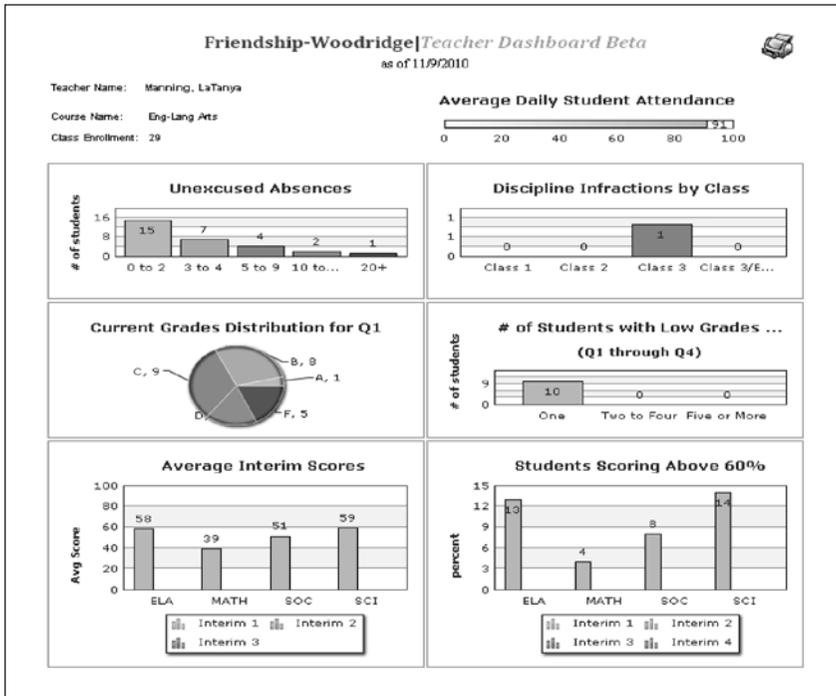


Figure 2: Friendship-Woodbridge Teacher Dashboard

Figure 2 shows a screen shot of a dashboard that gives teachers a real-time view into the average daily attendance, number of unexcused absences, low grades, and test scores, among other things. Each chart on the dashboard allows the teacher to “drill down” to the underlying data—or, as we put it, “move from numbers to names.” Previously, our teachers had to compile data on Excel spreadsheets to get access in one place to all of their student indicators. Today, any time an entry is made in a student record, the dashboards update automatically—saving each teacher as much as eight hours a month.

I recently visited classrooms where teachers posted their dashboards as their classroom “scorecard” to motivate students to work together to improve attendance and reduce discipline infractions. In a fourth-grade class, students proudly showed me the day when they qualified for a pizza party by having thirty days in a row of no infractions and perfect attendance.

**Lesson Two: Build the system to support teacher development, not just assessment.** At Friendship, we've found that the best teachers are constantly learning and growing. In building our system we focused on collecting the data that would provide the information we needed in order to assess our teachers fairly and, as important, to nurture their growth.

The indicators on the teacher dashboards reflect the indicators chosen by teams of teachers, school leaders, parent representatives, and board members to be part of each teacher's performance evaluation and professional development planning. With performance indicators such as average daily attendance, discipline referrals, and student assessments, we are now putting in the hands of our teachers the data they would typically not have seen compiled until it was time for their evaluation. Each teacher now knows on a moment-to-moment basis how student performance in his or her classroom is tracking and can intervene more quickly and intelligently. Similarly, our coaches and administrators can see how each teacher is performing in order to build and deliver the professional development programs tailored to their specific needs.

We recently expanded one of our middle schools to serve early-childhood students, starting at preschool. Early in the school year, we brought the early-childhood teachers together to examine and discuss data on the young students. It was the first time that many of the teachers new to Friendship had ever had to share publicly how their students were performing against standards. "During the talk," the professional development organizer noted later, "our best teachers, especially from our established early-childhood programs, were able to help the new teachers around increasing vocabulary, improving instruction, and ensuring that early-childhood classrooms are more than just daycare."

**Lesson Three: For real breakaway performance, make the data useful for students and parents (not just administrators and teachers).** Friendship's overarching goal is to develop ethical, well-rounded, literate, and self-sufficient citizens. High student achievement, high graduation rates, and high levels of college acceptance are necessary but not sufficient results. College completion and career access are our higher aspirations. To achieve our goals for our students, we work to ensure that they develop the key behavioral competencies necessary for making good choices and that they demonstrate an independent drive for results outside the structured and supportive environment of our schools. Friendship's goals are expressed most clearly in our academic and extracurricular emphasis on parent and student ownership of individual performance.

Because of this emphasis, we built our performance-management system in a way that would ensure that students and their parents understand and value the new data. Teachers begin by helping students learn how to track their own data. We expect students as young as kindergartners to be able to explain and provide evidence of their progress to their teachers, their peers, and their parents. Once students have demonstrated sufficient mastery of these skills and behaviors, they are introduced to grade-level-appropriate student dashboard tools to assist them in tracking their progress and setting more ambitious goals for themselves. We extend our work to parents by preparing customized data reports that they can review with the teacher and their child. We've learned that our parents are hungry for more data about their child's progress and want to feel knowledgeable about what the data mean and what they can do to help their child succeed.

### **Worth the Investment**

In today's environment of heightened accountability, it's easy to decide to institute a performance-management system, but it's not so easy to actually do it. For Friendship, the work has been challenging and is still ongoing. However, we have begun to be able to truly

diagnose performance issues, better identify our best teachers, and better target solutions.

Our oldest and newest campuses best tell the story of the impact of building a system to better manage performance. At [Chamberlain Elementary](#), which Friendship founded in 1998, we received our first standardized test results in the spring of 1999. We raised the percentage of proficient students to over 40 percent, but by 2006 proficiency languished in the mid to upper 30s. Since implementing the performance management system, we’ve seen a strong increase in reading and math proficiency. As seen in Figure 3, at our newest charter elementary campus, [Southeast Elementary](#), our latest test scores show that we have more than doubled the proficient students in reading and math since opening the campus.

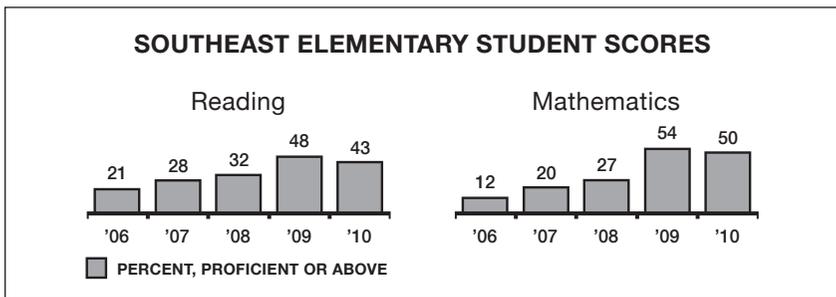


Figure 3: Southeast Elementary Proficiency Scores

### “A” for Effort *and* Rigor

Prior to instituting our performance-management system, I often talked about J. Paul Getty’s formula for success: “Rise early, work late, strike oil.” I’ve now stopped using that quotation—and not because of people’s associations with oil drilling in the aftermath of the BP disaster. The reason I’ve stopped using it is that I no longer want to give the impression that long hours are the most important factor in striking oil, or educating students. Nowadays, the oil industry invests tremendous effort in collecting and using data to guide every aspect of operations, and they get a huge return on that investment. That is what we are trying to do at Friendship. We want to know in real time

where to invest time, energy, and money to move student achievement throughout the classroom, the schoolhouse, and the network of schools we manage.

A strong work ethic will always be key to our approach. But now we have the data to help us direct that effort in a way that more predictably produces student success.