

September 2018

2017/18 Strategic Plan Annual Outcomes Report

Prepared by:



The Office of Strategic Initiative Management



Message from our Superintendent of Schools

The 2017/18 school year was an extraordinary year for the District. We entered the second year of our three-year Strategic Plan staying focused on our District's three strategic pillars of high-quality instruction, continuous improvement, and effective communication. These plans were significantly impacted by multiple natural events and the tragic incident on February 14 at Marjory Stoneman Douglas High School.

Throughout the year, we are fortunate to have dedicated teachers, administrators, and support staff, all working together to provide essential services to our students and families. Through resiliency, compassion, patience, and teamwork we have achieved continued Districtwide improvements in teaching and learning that give our students the life skills they need for long-term success.

Scholar and writer Thomas Merton reminds us that "life is a very great gift and a great good, not because of what it gives us, but because of what it enables us to give to others." The greatest



Mr. Robert W. Runcie, Superintendent of Schools.

gift we can give our children is a high-quality education. Our children need to be engaged in a learning process that equips them to deal critically and creatively with life challenges and opportunities and to contribute toward the transformation of their world.

Academically, our foundation starts with excellent early learning and literacy experiences. This foundation continues with applied learning where students use their knowledge and skills to solve problems and extend their learning and culminates with students who are emotionally resilient and academically prepared for the challenges of the global community, as they go on to colleges and careers.

The work of the District's Office of Strategic Initiative Management (SIM) is student-centered and continues to evolve by driving accountability through its focus on student achievement and continuous improvement initiatives across the District.

This report highlights our work over the past 12 months, with an emphasis on how we plan, how we execute, and the results we achieve. During the current 2018/19 school year, SIM is leading the strategic planning process for the next three-year strategic plan.

This is a good school district. Let's work together to make it a great school district. Let's give our children the gift that will last a lifetime.

Sincerely,

Robert W. Runcie

Superintendent of Schools

Message from our Chief Strategy & Operations Officer

Over the last few years, Broward County Public Schools (BCPS) has made meaningful strides in student achievement and fiscal responsibility. Under the leadership of Superintendent Runcie and the School Board, the District:

- Shows steady academic progress as 96 percent of schools earned an A, B, or C from the state in 2018. Only one school received an F, as compared to ten in 2016.
- Achieved a graduation rate of 81 percent in 2017—our highest rate since Florida adopted the Federal Uniform Graduation Rate method in 2011.
- Demonstrated fiscal responsibility by doing what is right for our students, in spite of the continuous erosion of funding for K-12 public education.

When the 2017/18 school year began, the District was poised for another year of strong academic performance. Due to Hurricane Irma, and the tragic event at Marjory Stoneman Douglas High School on February 14, 2018, the District was challenged to execute strategic initiatives in the context of necessary and urgent responses to these events with limited financial and human resources. It was imperative that we had the discipline, structure, and framework in place that provided us the ability to stay focused on our District's mission of educating all students to reach their highest potential.

Michael E. Porter, an American academic known for his theories on economics, business strategy, and social causes once stated, "the essence of strategy is choosing what not to do." The Office of Strategic Initiative Management (SIM) takes that statement even further by introducing an emphasis on strategic priorities by driving execution on, "those things we choose to do."

SIM is a specialized office within the division of Strategy & Operations. SIM guides BCPS in the execution of its Strategic Plan which aims to maximize student achievement. This collaborative effort includes facilitation of strategic planning, accountability, project management, process improvement, performance management reviews, program evaluation, logic model development, and quality assurance.

SIM's Mission: Driving organizational excellence through strategic plan execution.

The 2017/18 Annual Outcomes Report highlights the progress of year two of our 2016/19 Strategic Plan and the second full year of applying the SIM set of tools and processes for strategic plan execution. Continuous improvement of our strategic initiative implementation capabilities is essential to ensuring that our Plan is on track for future success. Through quality strategic plan execution, we aim to realize our shared vision of educating today's students to succeed in tomorrow's world.

Sincerely,

Maurice L. Woods

Chief Strategy & Operations Officer



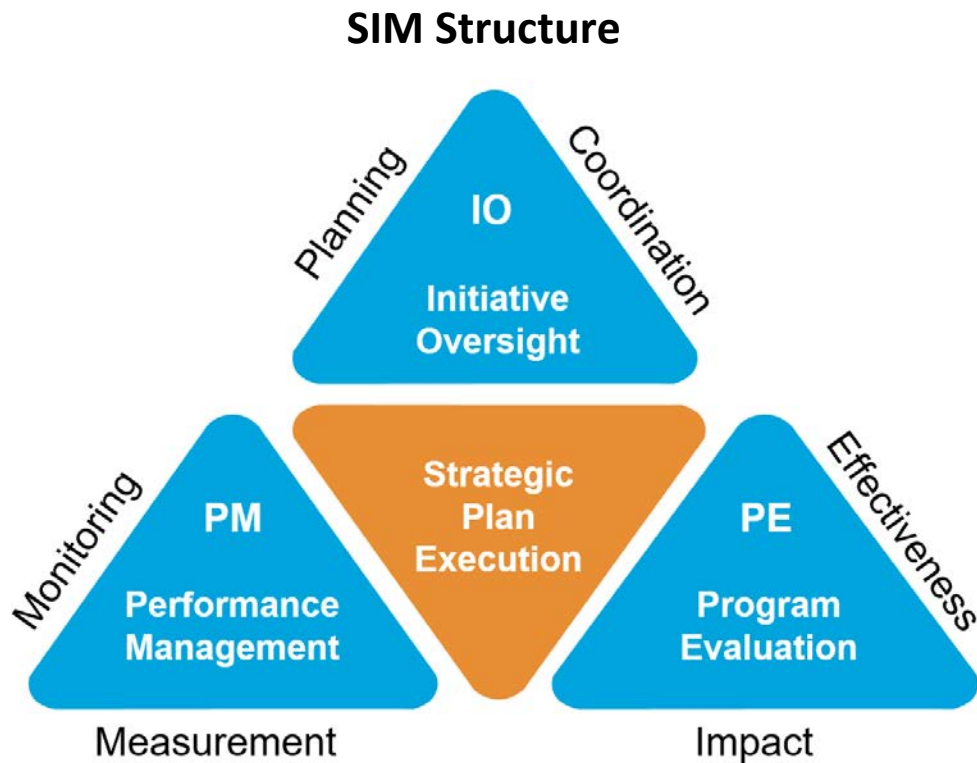
Mr. Maurice Woods, Chief Strategy & Operations Officer, addressing the Strategic Plan Committee during the Strategic Plan Kickoff on July 17, 2018.

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I. Office of Strategic Initiative Management (SIM)



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II. Executive Summary

The 2017/18 school year marked the second year of Strategic Initiative Management (SIM) at Broward County Public Schools (BCPS). This report describes how the SIM framework¹ was fully applied to oversee, monitor and evaluate two critical High-Quality Instruction (HQI) District initiatives: Ensuring Literacy Development in the Early Years (or “Early Literacy”); and Reimagining the Middle Grades (or “RMG”). Around a third initiative—College and Career Readiness (or “CCR”)—key stakeholders were regularly engaged to shape the tactics that will be implemented over the next several years to help students be well-prepared for the challenges and opportunities they will face when they commence their adult lives after graduation. Numerous other activities covered throughout this report were accomplished to advance the District’s progress toward its Continuous Improvement (CI) and Effective Communications (EC) goals, which are outlined in the District’s Strategic Plan, available at www.browardschools.com/sim.

On February 14th, 2018, the Broward community suffered a horrific incident when an active shooter terrorized students and staff at Marjory Stoneman Douglas High School, ending the precious lives of 17 individuals and injuring 17 others. Repercussions from the tragedy continue to reverberate across our community and, among many, will for the rest of our lives.

In the aftermath of such a tragedy, everyone at BCPS must be resilient. SIM remains resolute in its mission to drive organizational excellence. The SIM process is being leveraged by the District to guarantee that its work remains focused on its strategic priorities. Concomitantly, the SIM process is being used to support the District’s pledge to provide safety, transparency, and compliance with new State laws.

This report highlights our work over the past 12 months, with an emphasis on how we plan, how we execute, and the results we achieve. It also describes how the SIM organization is evolving to better serve BCPS and, ultimately, all Broward County stakeholders who stand to benefit from excellence in public education.

Why publish an annual outcomes report? In short, because there is clarity in perspective. Looking back over the year in its entirety, informed by a full suite of both quantitative and qualitative data collected at various times and consolidated in one place, gives us an opportunity to identify and build upon what is working, to correct what is not working, and to plan better for the future.

The report is structured in a manner that highlights our new engagement model. That model is organized around a suite of services, such as Strategic Consultations, Benchmarking, Data Analysis and Interpretation, Performance Management Reviews, and Project Plan Development, to name a few. Our services are deployed in ways that are responsive to the needs of the organization and respectful of the maturity level of the initiatives underway. Whereas the launch of a new initiative may activate the need for many services, an initiative in its second or third year likely requires fewer, or more selective, services.

Finally, this report looks at the year ahead and outlines our priorities for the 2018/19 school year. Crucially, the District, guided by SIM, will develop a new three-year strategic plan for launch in July 2019.

¹ The SIM framework combines the disciplines of initiative oversight, performance management, and program evaluation to drive successful implementation of the District’s strategic initiatives. It facilitates communication across school district divisions and stakeholder groups of progress and helps ensure that staff performance appraisals are clearly mapped to the District’s strategic goals. See the *Strategic Initiative Management 2016/17 Annual Outcomes Report*.

Key Findings

During the 2017/18 school year, the SIM office worked predominantly to: (a) sustain the Early Literacy initiative that was implemented in 2016/17; (b) launch the RMG initiative; and (c) spotlight continuous improvement activities in vital operations, namely Food and Nutrition Services (FNS), Physical Plant Operations (PPO), Procurement and Warehousing Services (PWS), and Student Transportation and Fleet Services (STFS).

Academically, BCPS's tactics around Early Literacy aim to transition students by the end of third grade from *learning to read independently* to *reading to learn*, while RMG strives to engage middle school students with *applied learning* opportunities, *project- and problem-based learning*, and *social and emotional* skills and awareness. The SIM team's spotlight on operations recognizes that student achievement is enhanced by good nutrition, a well-functioning physical environment, and dependable transportation. A year-end review of 2017/18 outcomes yields the following findings:

- 1) **The District successfully sustained its early literacy progress and positive momentum continues.**
 - a. Administration of the Benchmark Assessment System (BAS) to Grades K to 3 students exceeded 95% among non-exempt students and exceeded 59% among exempt students.
 - b. Among third grade students, Florida Standards Assessment (FSA) English Language Arts (ELA) scores at or above proficiency improved from 57% to 59% overall from 2016/17 to 2017/18. Among the traditional schools, proficiency rates increased from 56% to 57% during the same period.
 - c. Most teachers in Grades K (60%), 1 (60%), 2 (55%) and 3 (52%) have completed the professional development on the Benchmark Assessment System; which is the foundational course for the Professional Development Balanced Literacy Pathway.
 - d. More than 90% of Grades K to 2 teachers were successful at growing their students at least two reading levels; more than 76% of Grade 3 teachers realized this level of success.²
 - e. Student identification for targeted support (documented interventions) in reading has continued to show improvement to more closely align with below-proficiency performance on the FSA.
 - f. BCPS's quality assurance efforts are working, as evidenced by the correlation ($r=.44$) between schools that adhere to the balanced literacy framework and better student outcomes.
- 2) **The District was awarded multi-year grant opportunities exceeding \$6 million to fund new educational models for the Middle Grades.**
 - a. More than 40 principals, 360 teachers, and 240 students collaborated to reimagine the middle grades experience and guide the District's roll-out.
 - b. Four implementation models were established to support the adoption and delivery of new curriculum that stresses standards-based interdisciplinary learning and social and emotional well-being.
 - c. Three schools moved to block scheduling to better accommodate project- and problem-based learning (PBL), while six schools won approval to do so for the 2018/19 school year.

² Excludes students who were exempt from BAS due to having reached end of year performance criteria.

3) Meaningful performance improvements were achieved across District operations.

- a. Meal participation District-wide has been steadily increasing since 2014/15, with both lunch and breakfast participation now at seven-year highs (64% and 30%, respectively).
- b. New processes in Procurement have enabled staff to manage 27% more Board items than in 2016/17.
- c. The number of Small, Minority- and Women-owned Business Enterprises (SMWBE) certified to provide services to BCPS increased by 11% over August 2017.
- d. Savings achieved through Procurement initiatives improved approximately 25% compared to last year.
- e. As of third quarter 2017/18, transportation-related customer service complaints fell by 35% compared to the prior year.

The BCPS commitment to continuous improvement is yielding positive results. However, authentic continuous improvement requires that the District courageously confronts persisting challenges. In the context of its 2017/18 work, the SIM team observed the following:

- 1) Demographic achievement gaps that surface in Kindergarten generally remain or widen by third grade.
- 2) While compliance with Multi-Tiered System of Supports (MTSS) and Response to Intervention (RtI) protocols is improving, visibility into the effectiveness of reading interventions is limited. Interventions are happening, but it is not clear how well they are working.
- 3) A number of job descriptions in District operations are obsolete or amiss, which impedes the District's ability to hire qualified candidates.
- 4) There is an ongoing need to operationalize the collection, recording, maintenance, and reporting of data across the organization.
- 5) Visibility into how schools have independently invested the instructional and professional development dollars allocated to them is not readily available. As such, determining whether spending at the school level is aligned to the District's strategy is challenging.
- 6) Investments in the maintenance of the physical plant have never recovered to pre-recession levels. As infrastructure continues to age, the District is in a precarious position where it increasingly operates in a reactive mode and defers preventative maintenance work orders.
- 7) Funding uncertainty is leading to project delays in both Academics and Operations, declining morale among staff, and trade-offs that challenge the sustainability of the District's strategic initiatives.

More context behind the above findings is provided throughout this report.

Recommendations

This report provides visibility into the results achieved in 2017/18, as well as the activities planned for 2018/19, within the current scope of services provided by the SIM Office. Recommendations to the project teams and departments with which SIM works are offered regularly. Highlighted here are fundamental—but by no means exhaustive—recommendations for advancing the District closer to its goals.

- 1) With the Early Literacy initiative entering its third year of implementation, SIM recommends that the focus of Year 3 shift from sustaining the work to extending the maturity of the model in a way that both recognizes and responds to schools' needs and student mix. SIM has developed an Early Literacy Environment dashboard, described later in this document, to help inform that work along with the BAS and student achievement dashboards already available through Student Assessment and Research (SAR).
- 2) BCPS is meaningfully altering the Middle Grades experience. New Middle Grades models should be paired with formalized feedback mechanisms to heighten their responsiveness to the needs of students and teachers.
- 3) More coherence is needed around the District's approach to social and emotional learning (SEL). Various programs adopted at the school level and the absence of a common instrument to gauge student well-being may lead to uncertainty over the efficacy of any particular program. The District should investigate how to scale the SEL tactics it has defined in its RMG framework across elementary and high schools.
- 4) Professional development (PD) of teachers is a critical success factor for academic initiatives across the K to 12 spectrum. Intentional efforts are needed to assure that what is learned is going into practice. Successful implementation of new systems that link PD needs, training, observations, and student outcomes is crucial, provided they shape how the District develops and delivers PD.
- 5) The changing needs of the District, a tight labor market, and the evolution of technology drive a recommendation for a District-wide overhaul of job descriptions. New job descriptions should reflect the elevated role that technology plays horizontally across operations and vertically between organizational tiers. A review of similar job descriptions in neighboring Palm Beach and Miami-Dade is essential, since BCPS competes with them for talent. In parallel, District department heads are urged to develop succession plans to facilitate smooth transitions.
- 6) Strategic plan progress monitoring, grant-related reporting requirements, new State legislation, and authentic efforts at continuous improvement underscore a need for District departments to develop a regular cadence behind the collection and reporting of data that inform the organization. The adoption and use of collaboration tools (e.g., Microsoft Outlook), as well as the tools and services available through SIM, can facilitate that.
- 7) Legislative activities that aim to secure higher funding should be matched with concerted efforts to increase student enrollment. Greater cohesion is needed to "win back students."

III. Year-Two in Review: Major Accomplishments of SIM

The 2017/18 school year was the second year in which the SIM framework was applied to support the implementation of strategic initiatives at BCPS. This section describes the District’s progress with respect to literacy development in the early years, a reimagined middle grades experience, and college and career readiness. In addition, the findings from Performance Management Reviews on Food and Nutrition Services, Procurement and Warehousing Services, Student Transportation and Fleet Services, and Physical Plant Operations are discussed, as are special projects, toolkits, and ancillary projects that received extensive support from or were executed by the SIM Office.

Before covering those highlights, however, changes in the SIM structure, process, and engagement model—which reflect the SIM Office’s own efforts at continuous improvement—are presented next.

A. SIM Structure & Process Implementation

A District the size of BCPS that operates under constrained funding faces formidable challenges when it comes to scaling up strategic initiatives. Charged with facilitating excellence in strategic plan execution, the SIM Office is keenly aware of those challenges. To better address scale-related challenges, the SIM Office, under new leadership, has adapted the way it conducts business such that it can be more responsive to the organization while at the same time empowering employees to align, plan, and execute their work in a coordinated way. This section describes the new SIM structure and how SIM services are designed to support BCPS.

New Leadership

Dr. Deborah Posner was hired as the District’s new Executive Director of Strategic Initiative Management (SIM). Prior to accepting her current role at BCPS, Dr. Posner served as Associate Vice President for Institutional Planning and Effectiveness at Broward College (BC), in Fort Lauderdale, Florida. There she oversaw the strategic planning process and continuous improvement assessment cycle and helped lead BC to receiving the prestigious national Aspen Award for community college excellence. She also served as a Chapter President for the Association of Florida Colleges (AFC), and this past year received the statewide AFC Unsung Hero Award. Her previous roles in higher education administration also include serving as a Dean and a District Director at BC. Dr. Posner earned her Doctorate in Higher Education Leadership, taught high school and college level courses, and served as a consultant and national speaker on strategic planning, process improvement, and change management.



Dr. Deborah Posner, Executive Director of Strategic Initiative Management (SIM).

Dr. Posner began her new position with BCPS on March 28, 2018. The following is an outline of Dr. Posner’s first 90-Day report, which summarizes her onboarding and re-defined directional focus for SIM and constituent departments.

Onboarding & Observations

Dr. Posner laid the foundation for her tenure in BCPS through one-on-one introductory meetings with key staff, visits to key locations throughout the District, participation in District meetings and presentations, observational analysis of the District, and a refresh of SIM’s branding and marketing.

One-on-One Introductory Meetings

Dr. Posner conducted 37 one-on-one introductory meetings encompassing 10 district locations and focused on current issues confronting the District with key staff, including Board Members, Cabinet, Directors and SIM staff.

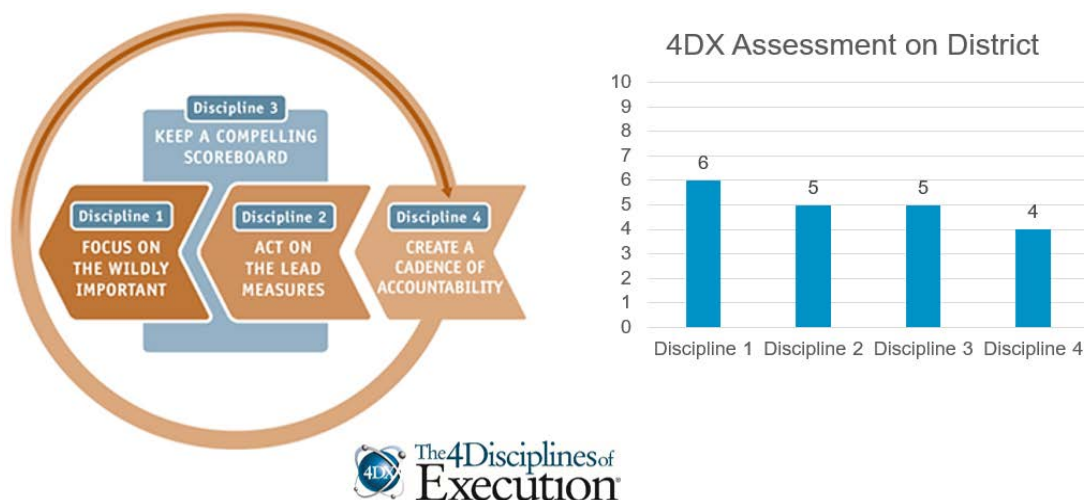
District Meetings/Presentations

Dr. Posner participated in 14 key meetings and presentations in her initial 90 days that spanned the multitude of meeting types that occur within the District and included 4 Performance Management Reviews, 4 Cabinet meetings, 1 Board Workshop, 3 Directors/Collaborative meetings and 2 Plan Development Updates (PDU’s).

Observational Analysis of District

Through an informal observational analysis, Dr. Posner reviewed current District-wide goal alignment and consistency of the framework for execution and accountability with best practices outlined in *The 4 Disciplines of Execution (4DX)* and identified various gaps and opportunities for improvement at multiple levels. These disciplines include: focus on the wildly important, act on lead measures, create a cadence of accountability and keep a compelling scoreboard. As depicted in Figure 1, the findings illustrate that areas for improvement in the District are equally distributed across all of the four disciplines of execution.

Figure 1. Observational Analysis of District-wide Goals Within the Framework of *The 4 Disciplines of Execution (4DX)*



New Processes & Outputs

After a thorough review of the SIM department’s processes and outputs, Dr. Posner outlined four focus areas for SIM to improve upon its current operating model. These focus areas include branding and marketing, staffing/functional re-alignment and professional development, establishing a clear menu of services with corresponding service level agreements (SLA), and providing an improved approach to the 2019-22 Strategic Plan development process.

Branding & Marketing

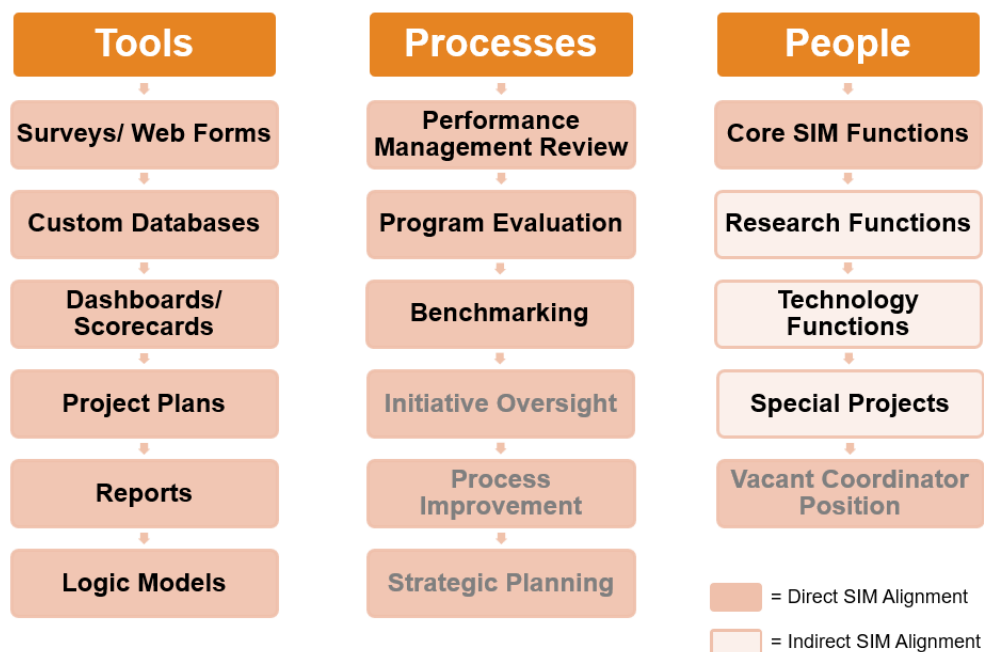
The initial focus was on the branding and marketing surrounding the department, Strategic Initiative Management (SIM), and providing unity to the umbrella of areas that fall underneath which include Performance Management (PM), Program Evaluation (PE) and Initiative Oversight (IO). Key activities included:

- Refreshed and streamlined SIM Mission Statement: *Driving organizational excellence through strategic plan execution.*
- Creation of business documentation standards for SIM documents that include new logo, headers/footers, and signatures for a consistent “look and feel” to published toolkits.
- Publication of marketing vehicles that include a monthly newsletter and physical collateral, such as bookmarks and flyers.
- Redesign of SIM website and internal SharePoint site to reflect new structure and branding, be more user-friendly and ADA-compliant, and offer more value-adding resources for visitors.

Staffing, Functional Re-Alignment & Professional Development

Secondly, Dr. Posner performed detailed analysis and mapped the current alignment of SIM resources in the context of three buckets: tools, processes, and people (see Figure 2):

Figure 2. Analysis of SIM Resources



The review of the current alignment of SIM resources uncovered the following areas for improvement which have been addressed to maximize current team resources and provide additional functionality to District departments:

- Transition of Internal Review Board (IRB) related functions from Program Evaluation (PE) back to Student Assessment and Research (SAR).
- Re-purposed Program Evaluation Administrator for performing Strategic Plan research and analysis functions.
- Coordinated, hired and onboarded a new Coordinator for Initiative Oversight (IO).
- Certified entire team as Lean Six Sigma White Belts.
- Scheduled attendance/speaking roles at several professional conferences: Continuous Improvement Conference (CIC), Council of the Great City Schools (CGCS), American Productivity & Quality Center (APQC).
- Modified SIM’s current business model, and revised department approach towards engagement and providing the District a menu of services.

Engagement Model & Menu of Services

The shift in SIM’s business model to providing a published menu of services seeks to improve engagement, accountability and clarity into deliverables and expectations when District departments partner with SIM.

In the new business model, SIM actively manages current workload through a Workload Balance Matrix, which projects team capacity at any given time based on commitments listed in our SIM Communications Calendar. District departments populate Service Requests via an online form and enter into a Service Level Agreement (SLA) which details the expected turnaround time and set of deliverables by project and allows SIM the opportunity to prioritize and track new projects requested. Upon project completion, participants can provide feedback on a Customer Service Feedback form; survey results are analyzed for SIM’s internal continuous improvement efforts. Figure 3 depicts an overview of SIM value-added services and topics:

Figure 3. SIM Value-added Services and Topics

Services	Topics
<ul style="list-style-type: none"> • Consultations • Data Analysis & Benchmarking • Focus Group Facilitation • Online Resources • Planning Retreats • Scorecards & Reports • Training Guides • Web Tool Development • Workshops 	<ul style="list-style-type: none"> • Accountability & Execution • Lean Six Sigma • Logic Model Development • Performance Management • Process Improvement • Program Evaluation • Project Management • Quality Assurance • Strategic Planning

2019-2022 Strategic Planning Process

The re-alignment of the SIM business model to a menu of services also seeks to improve the District’s process in developing the new Strategic Plan, slated for a 2019 rollout. In preparation for the year-long process to create the 2019-22 Strategic Plan, Dr. Posner published a 1-year Strategic Planning Timeline (Figure 4) as well as set short- and long-term actions for SIM spanning the next four years (Figure 5). Through a Strategic Plan Committee, which has been recently formed, SIM facilitated a kickoff on July 17, 2018 and introduced committee members to the Strategic Plan development process, engagement and timeline. In addition to Strategic Plan Committee members, which include internal and external stakeholders, feedback and direction for the District’s Strategic Plan is being solicited at multiple venues and through multiple methods, including focus groups and the Strategic Plan Survey, which is available at www.browardschools.com/sim.

Figure 4. Strategic Plan Timeline

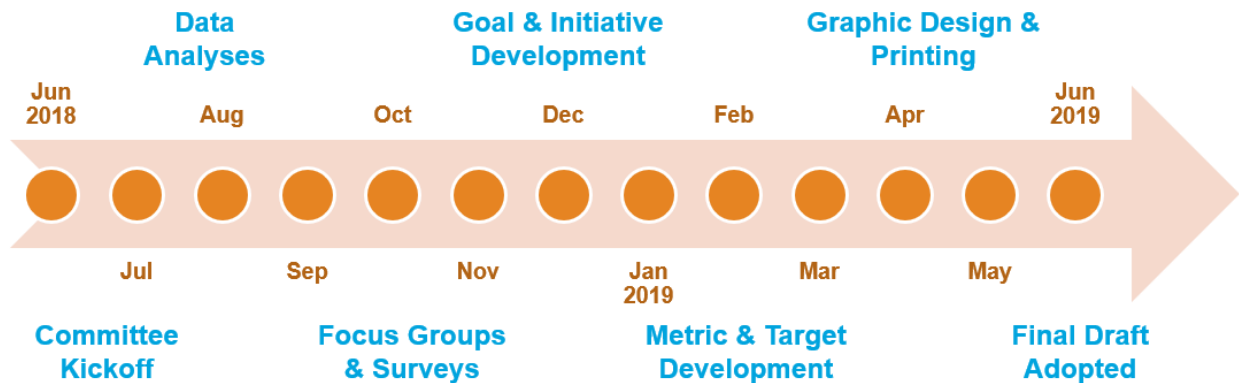


Figure 5. SIM Short- and Long-Term Actions

2018/19 Short-Term Actions	2019/22 Long-Term Actions
• Guide Execution of District 2016/19 Strategic Plan	→ • Improve District-wide Accountability and Goal Alignment
• Develop new District 2019/22 Strategic Plan	→ • Execute new District 2019/22 Strategic Plan
• Complete SIM Team Professional Development	→ • Provide District Professional Development and Services
• Overhaul SIM Communications and Marketing	→ • Facilitate a Culture of Continuous Improvement
• Establish a Service Level Agreement Project Model	→ • Increase SIM Customer Service Quality, Scale, and Impact

B. SIM Menu of Services

SIM services are currently utilized most comprehensively in connection with BCPS's High-Quality Instruction (HQI) initiatives. The tactics associated with the HQI initiatives are grouped into elementary, middle, and high school portfolios. Each portfolio is directly managed by a Portfolio Manager responsible for overseeing the subject matter experts (Project Managers) who lead the work streams associated with the advancement of an initiative. Collectively, the Portfolio Manager and Project Managers report to Executive Sponsors, or Cabinet-level individuals who hold ultimate accountability for implementation of strategic initiatives. See Appendix A for role descriptions.

While SIM resources are deployed continually to provide services and support around BCPS's HQI initiatives, they also support CI and EC initiatives and the broader organization when critical needs arise. This section describes the full suite of services available through SIM.

Board Workshop Development

BCPS is governed by nine elected officials who are entrusted with the proper care, management and control of District affairs. Thus, Board Member engagement around strategic initiatives is not only essential, it is imperative.

The SIM process convenes initiative Executive Sponsors and Project Managers and School Board of Broward County, Florida (or "School Board") representatives on a recurring basis at publicly-advertised School Board Workshops. Periodic Board engagement ensures that School Board representatives gain deep visibility into the planning, funding, and rollout of an initiative at logical intervals where course changes, if needed, can be accommodated. Board Members can express their concerns and preferences in a forum that is accessible by and responsive to their constituents.

Board Workshops around strategic initiatives promote a healthy dialog that provides essential project guidance. The SIM team provides Board Workshop development services that:

- 1) Manage the agenda planning protocol and scheduling of Board Workshop items;
- 2) Recommend scope, content, structure, and format of the Board Workshop presentation; and
- 3) Assist with the compilation, interpretation, and presentation of data which inform the District's progress.

While Executive Sponsors have final say on the scope and content of Board Workshop presentations, SIM strives to ensure that any open issues identified in a Workshop are adequately addressed in subsequent Workshops.

In addition to Board Workshops around District strategic initiatives, the SIM team offers Board Workshop Development services to District Departments on request if SIM resources are available to support them.

Performance Management Reviews

District departments occasionally request or are requested to participate in a Performance Management (PM) Review. The requests reflect an interest on behalf of the Superintendent, Senior Leadership Team,



Student Transportation & Fleet Services staff accompanied by SIM staff during May 18, 2018 PM Review.

School Board Member, or other stakeholder to receive an update on the value-added services provided by a department and its key performance indicators, as well as to understand the challenges it faces in providing those services. The review provides an opportunity for District leadership and department heads to collaborate directly with a singular focus on the core business of the department under review. The purpose is to identify solutions or corral resources to help address day-to-day challenges and improve overall performance. Often, a request for a review reflects an interest to understand whether District investments in critical

areas are providing the expected efficiencies.

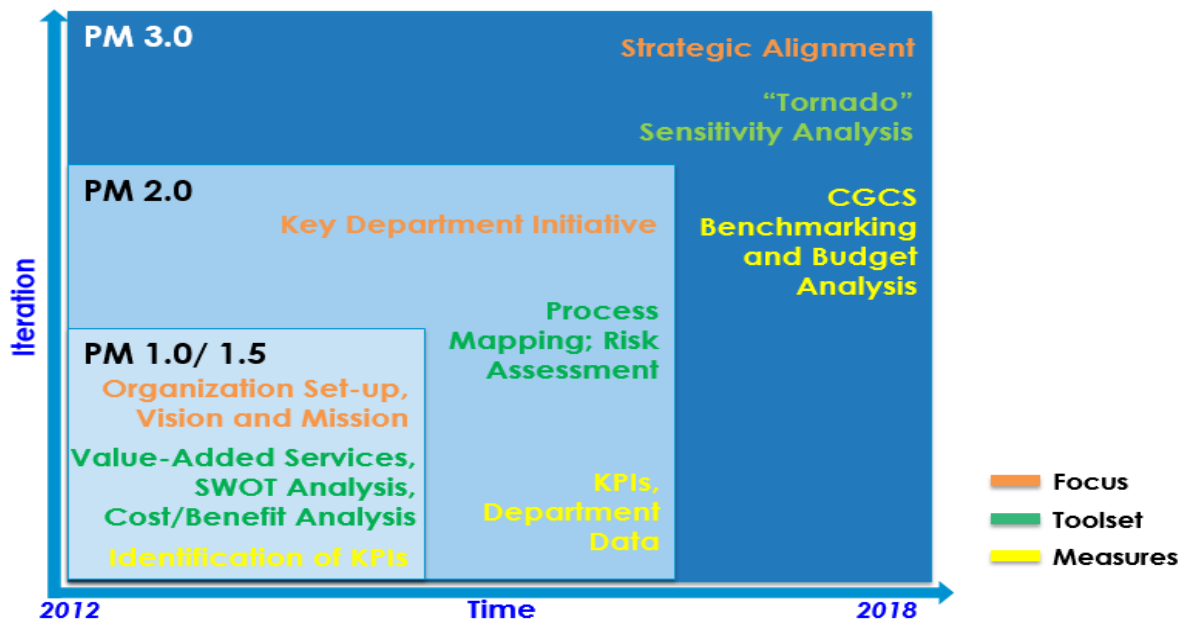
The SIM Team manages the PM process in its entirety, and PM Reviews are a fundamental offering on the menu of services available through the SIM department. The process begins with a kickoff session wherein the SIM team describes:

- 1) The objective of the Review as it relates to the scope of the session (i.e., “who asked for what and why?”);
- 2) The template and toolset that will be used to produce and frame the content; and
- 3) The metrics that will be highlighted to gauge overall performance.

During the 2017/18 school year, Performance Management 3.0 was launched. The third generation of PM at BCPS builds upon the focus and toolsets of prior generations³, thereby expanding the repertoire of familiar management approaches available to District departments as they adapt to meet growing or new demands on their core business (see Figure 6). Specifically, PM 3.0 introduced a Tornado Analysis, a construct that is useful for understanding which levers are the most important to the decisions, risks, or problems at hand. The tornado visualization (see Appendix B for sample) can help departments set priorities and allocate resources where they are most likely to have an impact on overall performance. The exercise also helps set District performance expectations by identifying those levers over which a department may have limited influence. For example, a natural disaster over which there is no control can dramatically affect costs (or revenue, participation, etc.) that calculate into a department’s key performance indicators (KPIs).

³ Examples of tools used in PM 1.0, 1.5, and 2.0 include SWOT Analyses, Cost/Benefit Analyses, Project Plans, and Process Maps.

Figure 6: The Evolution of Performance Management Reviews at BCPS



Preparations for a PM Review are facilitated by the SIM team. Multiple working sessions are conducted over four to six weeks to ensure that the context behind performance measures is fully explored, understood, and presented in a fair, non-judgmental manner that brings light to the Review rather than heat. An initial draft of the content and presentation are provided to the Superintendent, Chief of Staff, Chief Financial Officer, and Chief of Strategy and Operations, who often request additional detail or offer alternative points of view, recommendations on messaging, etc. The PM Review process culminates in a 90- to 120-minute formal presentation attended by all Senior Leadership and other key stakeholders. Time is afforded for an extensive question and answer period. The SIM team records action items that surface during the discussion and subsequently distributes them. The department head and his or her respective Chief are responsible for ensuring that the action items are properly addressed in a timely way. Departments are encouraged to communicate their progress on action items through Board Workshops, staff meetings, Principal meetings, memoranda, and/or other vehicles.

Cabinet Update Facilitation

The Superintendent meets with his full Cabinet on a weekly cadence. SIM reserves time on the agenda approximately once per month to update the Superintendent and Cabinet on the progress of the HQI strategic initiatives. Through its Cabinet Update services, SIM works with Portfolio and Project Managers to develop the content presented in the update, which includes three components:

- 1) The SIM Scorecard, which shows the tasks, milestones, and metrics associated with the project work and indicates whether progress is on-target or delayed;
- 2) A Risk Register that (a) highlights those tasks where on-time completion appears to be in jeopardy based on the progress reported by the Project Manager and (b) classifies the risk as to whether it is related to a scope, resource, or effort estimate (or other) issue; and
- 3) An overview of the most current process, output, and/or outcome metrics with, where available, year-over-year comparisons.

Examples of the SIM Scorecard and Risk Register are included in the Appendix C and D, respectively.

For 2017/18, the SIM team invited individual Portfolio and work stream Project Managers to appear at Cabinet Updates on rotation. That way, in addition to providing a full overview of progress across the portfolio, the SIM team coordinated an opportunity for the Superintendent and Cabinet to dive deeply into the activities of a specific work stream with the Project Manager to provide additional color, answer questions, and address concerns.

Data Analysis & Interpretation

Through its Data Analysis and Interpretation services, SIM works with District departments to identify, collect, groom, analyze, organize, interpret, and present data such that it is successfully converted into usable information that provides meaningful insights and actionable guidance. That regularly involves the triangulation of data, the use of more than one method to collect data and to support continuous improvement. Where needed, SIM assists with the design of data collection methods and format, which can greatly influence the quality of the data received and the turn-around time of the analysis.

Efforts at continuous improvement, whether they are attached to academics or operations, are almost always multi-faceted. That is, they typically utilize multiple tactics to produce a result. Thus, SIM employs a wide variety of statistical methods to understand the likelihood that an outcome is the result of a particular tactic, or whether the outcome could be due to chance. The statistical methods in the SIM toolbox include parametric and non-parametric statistical analysis and modeling, including:

- Analysis of Variance (ANOVA/ANCOVA/MANOVA)
- Classification
 - Cluster
 - Discriminant
- Correlation
- Factor Analysis
- Reliability
- Regression
- Longitudinal Analysis
- Multilevel Modeling
- Non-Parametric Tests
 - Chi-Square Test
 - Friedman’s Test
 - Kruskal-Wallis Test
 - Mann-Whitney Test
 - McNemar’s Test
 - Wilcoxon Signed-Ranks Test
- T-Test/Paired T-Test

When associated with strategic initiatives, the data sets that are to be analyzed are identified early on in conversations with Project Managers. Those conversations are tied to the development of the Logic Model associated with the initiative (See Appendix E for a description of a Logic Model). The discipline of defining a Logic Model and identifying outcome metrics before any new program is introduced is one that the SIM team strives to cascade throughout the organization. That discipline puts District staff on much firmer ground when asked “how do you know if what you are doing is working?”.

Data Analysis and Interpretation services available through SIM often contribute to a misperception that SIM is the research arm of the Student Assessment and Research (SAR) Department. While SIM collaborates extensively with SAR, it provides such services separate and apart from, as well as in concert with SAR.

Benchmarking

The SIM Department provides Benchmarking services to identify opportunities for process improvements. Benchmarking services are automatically included in Performance Management Reviews, but they are also available independently. Annually, SIM produces a report, School District Key Performance Indicators: Values and Trends. The report provides benchmarks across both operations and academics, with specific emphasis on other Florida districts similar to BCPS. The benchmarks also draw from self-reported results on key performance indicators (KPIs) that are disclosed by large urban districts across the nation and compiled by the Council of the Great City Schools (CGCS) in its annual *Managing for Results* report.

The value-add of SIM's Benchmarking services is three-fold:

- 1) Trends over time are examined. Currently, SIM has consolidated six years of CGCS data into a master database, and annually adds another year's worth of history with each new publication.
- 2) Groupings of KPIs are jointly indexed to illuminate how business decisions or external factors (such as changes in legislation) can affect an entire family of KPIs.
- 3) Districts that consistently perform in the top quartile are identified. SIM advises District departments to reach out to their top-performing peers to identify improvement strategies that may be applicable to BCPS.

With all benchmarks, SIM urges caution, because rarely is it the case that they represent true "apples to apples" comparisons. However, that does not mean they are not useful. Rather, it underscores the need for the value-add described here. That's because a multi-year history can expose anomalies; an index of KPI groupings reflects the inter-related nature of the indicators and how they respond to change; and outreach to top-performing peers can reveal fundamental contextual differences.

Project Plan Build & Management

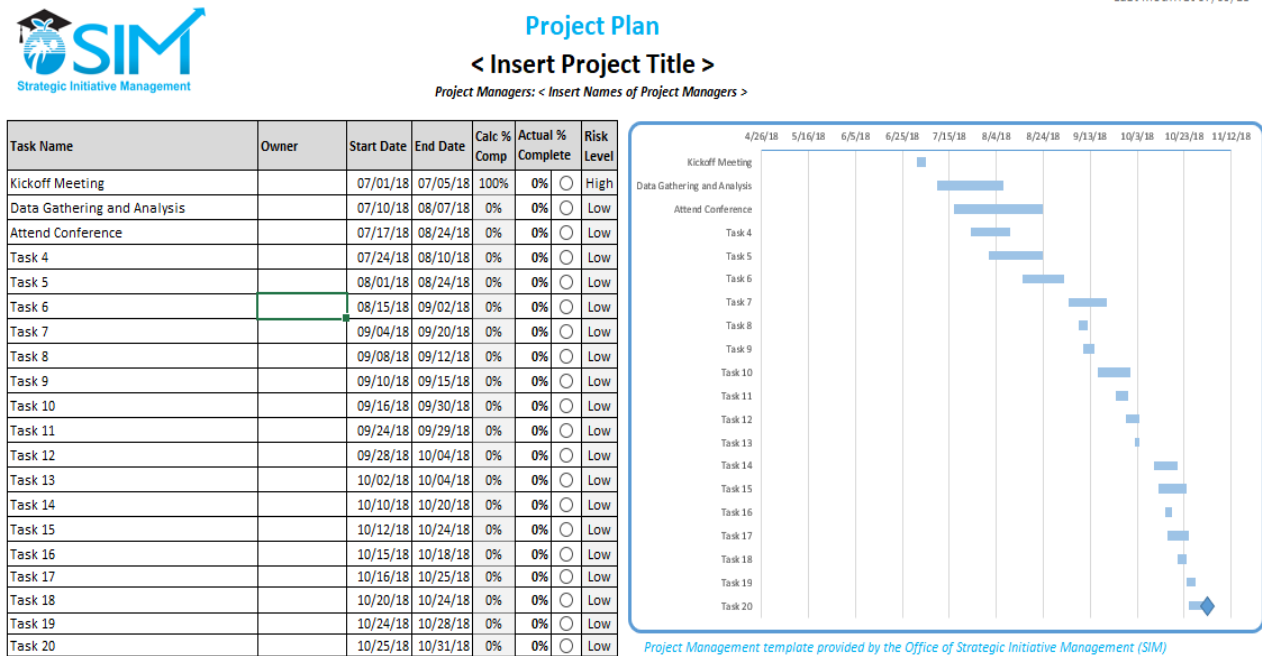
Project Plans form the cornerstone of SIM's approach to driving excellence in execution. SIM works with District staff to define the scope and objectives behind the work they do to implement an initiative. The process of mapping out the steps and timing needed to obtain their objectives results in a project plan.

SIM offers a project planning tool that captures the steps and phasing of projects, using a Gantt chart depiction (see Figure 7). The tool enables concise reporting on the status of complex projects; as such, it is a powerful communications vehicle when shared. By sharing Project Plans, Project Managers keep District leadership and staff informed on progress towards milestones. Likewise, risks can be communicated such that they can be addressed, and hopefully averted, before they materialize.

Because several projects often roll into one broad initiative, SIM adds value to the project planning process by identifying interdependencies between multiple Project Plans. Where interdependencies are identified, the SIM team can inspect timelines to recommend adjustments or convene work stream teams to ensure their expectations are aligned.

While Project Managers are responsible for project plan content, SIM serves as a thought partner to assist in plan development. In that role, SIM staff adopt a system-wide view to understand how departments throughout the organization may be affected, and whether project success or failure may rest on the actions of others. SIM challenges District staff to understand critical success factors before any plan is finalized.

Figure 7. Sample Project Plan Tool



Process Improvement Projects (PIPs)

Process Improvement support from SIM aims to identify opportunities for streamlining how BCPS operates while simultaneously enhancing service quality. SIM first initializes its support by mapping how an existing process is currently administered, with emphasis on knowing at each step:

- 1) The roles that are engaged;
- 2) The core function that is being performed;
- 3) The requisite inputs needed to perform the function, as well as the source(s) of those inputs;
- 4) The value-add that is being provided; and
- 5) The output that is delivered, and to whom it is being provided.

On the surface, the above information seems straightforward enough; in practice, however, the exercise often reveals serious deficiencies. The Lean Six Sigma discipline succinctly describes process deficiencies by the acronym, DOWNTIME, or the eight wastes: Defects, Over-production, Waiting, Non- (or under-) utilized talent, Travel, Inventory, Motion or movement that is unnecessary, and Extra processing. SIM uses the DOWNTIME construct to identify potential process improvements and works with District departments to map out more optimized approaches that remove waste and deliver a more consistent result.

Strategic Consultations

All services offered by SIM begin with a Strategic Consultation, but SIM also offers consultations independent from other services. Strategic Consultations give District departments an option to engage SIM when the diverse experience, perspectives, and objectivity of the SIM team can be leveraged to help solve a problem or capitalize on an opportunity. Consultations begin with discussions around problem definition. The SIM team probes for facts and data which support the client department's perceptions of what is needed and how well the client department is positioned to develop and implement a solution.

Each consultation is custom and develops organically in response to the issues being addressed. Most commonly, the consultations cover at least one of the following topics:

- 1) Development or refinement of a department's vision, mission and value-added services;
- 2) Strategic alignment;
- 3) Current state analysis and documentation;
- 4) Identification of desired state;
- 5) Solution brainstorming;
- 6) Theory of Action and Logic Model formulation;
- 7) Root cause analysis; and
- 8) Go-forward recommendations.

While a strategic consultation can be a “one-off” session with the client department, they frequently expand in scope to include multiple services, such as Data Analysis and Interpretation or Board Workshop Development support.

Add-On Services

Unique attributes of the SIM office position is to offer several add-on services in connection with the core services previously described. For example, SIM is a central receiving point of a wide assortment of performance, process, output, and outcome metrics. Its close work with Executive Sponsors, Portfolio Managers, and Project Managers across the organization give it deep visibility into the day-to-day needs and challenges associated with initiative implementation. Finally, among SIM staff the diversity of education (which spans the fields of Anthropology, Computer Science, Economics, English, Marketing, Mathematics, and Psychology) and experience (which includes both public and private sectors) provides a comprehensive mix of capabilities that can be very useful for advancing the District's work.

Add-On Services, briefly described next, include Web tools and databases, dashboards, focus groups, survey design and development, project management workshops, Lean Six Sigma, and planning retreats.

Web Tools & Databases

SIM staff develop Web-based and online tools that enable the collection and centralization of data associated with initiatives across the District. The data that is gathered can be exported to common office applications for easy management, analysis, and reporting. The tools are often used to administer surveys, to process requests, and to record logs associated with the implementation of research designs.

Dashboards

SIM staff utilize tools such as Power BI and Excel to create user-friendly dashboards that provide data visualizations of key process, output, and outcome metrics. The dashboards enable analytics and customizable views at a glance. With dashboards, users are empowered to perform their own queries independently.

Focus Groups

Focus groups convene small groups of participants in a guided discussion applying the Unfolding Matrix Model, to discover their perceptions, beliefs, opinions, and attitudes toward a topic of interest, such as a concept or product. The qualitative data obtained from a focus group can provide valuable directional insights.

Survey Design & Development

Surveys provide an extremely useful means of capturing answers to specific questions from a target audience. Survey design support from SIM includes survey format selection, question design, and rating scale considerations, as well as guidance on avoiding common pitfalls, such as leading questions, double-barreled questions, and built-in assumptions.

Project Management Workshops

In addition to Project Plan Build support, SIM offers Project Management Workshops, which are interactive sessions wherein concepts and phases that are essential to successful project plan execution are covered. The content of these “how to” sessions spans:

- 1) Project initiation: how to kick-off a new project effectively;
- 2) Project planning: how to develop a project plan;
- 3) Execution: how to foster collaboration and performance to achieve specific objectives;
- 4) Project monitoring and controlling: how to problem solve and trouble-shoot; and
- 5) Project close-out: how to wind down a project, including documentation, archiving, and lessons learned.

Clarity around project team members’ roles and responsibilities, understanding resource requirements, and the importance of interim reviews are crucial themes woven through the workshops.

Lean Six Sigma Training

All SIM staff are, at a minimum, certified in Lean Six Sigma methodology at the White Belt level. As a Black Belt, Dr. Posner is qualified to offer two-hour training sessions that acquaint attendees with the methodology and equip them with the knowledge they need to become certified at the White Belt level.

Planning Retreats

District departments that aim to significantly overhaul or reinvent their core business are advised to participate in Planning Retreats. Retreats physically and psychologically remove staff from day-to-day minutiae. The distance and perspective that are possible in a different environment can be very conducive to critical thinking and creative solution-making. Planning Retreats reinforce a department’s vision, mission, and values. Attendees participate in activities such as goal-setting or team-building. Clear expectations are set relative to plan development, plan execution, and accountability. SIM staff support the agenda planning, content production, facilitation, and activity selection of Planning Retreats.

C. Deliverables – Strategic Initiatives

The SIM framework was fully applied to oversee, monitor and measure the Ensuring Literacy Development in the Early Years (Early Literacy) and Reimagining the Middle Grades (RMG) initiatives as well as begin engagement with the third initiative, College and Career Readiness (CCR) to start shaping the tactics that will be implemented over the next several years. Summarized below is a comprehensive progress update of all the District’s Strategic Plan initiatives as well as in-depth summaries for the three initiatives within SIM’s concentrated focus.

Strategic Plan Progress Update

The 2016-19 Strategic Plan: Moving Forward on the Right Path called for 41 tactics across the three goals of High-Quality Instruction (HQI), Continuous Improvement (CI), and Effective Communication (EC). As 41 tactics are too numerous to simultaneously implement with fidelity, Cabinet narrowed the list to 10 prioritized initiatives. These prioritized initiatives are outlined in Figure 8 along with a summary of progress.

Figure 8. 2017/18 Annual Outcomes Report Goal Summary

	INITIATIVE	INTENT	KPI	IMPLEMENTATION
HQI	1 Standard measure for literacy	Know where students are	↑	BAS administered to over 98% of K-3 students
	2 Literacy materials & system supports	Optimize tools & environment	↑	3 rd Grade ELA FSA scores up 5 pts. from baseline
	3 Highly skilled teachers in K-2	Grow & place literacy experts	↗	Professional Learning Pathways defined
	4 Reimagine middle grades experience	Student engagement	↗	RMG initiative funded (\$6m+) and launched
	5 Academic rigor & life skills	Graduate students life-ready	→	Grad. rate up 4%, but safety, SEL need emphasis
CI	6 Budget equity & strategic alignment	Results-oriented investing	↑	Equity via formula-based school funding model
	7 Benchmark BCPS performance	Foster accountability	→	KPIs up in Transportation, Procurement, IT
	8 SMART bond projects	Enhance student experience	↗	Building & market conditions pose hurdles
EC	9 Use tools to monitor District progress	Alignment in execution	↑	Application of SIM toolset & project management PD
	10 Websites, tools, & customer service	Better customer experience	↗	New Website, Intranet & customer service PD

KEY: ↑ = Strong increase ↗ = Moderate increase → = Approaching

The 2016-19 Strategic Plan specified 24 objectives/targets for the three goals. In order to track progress on these objectives, SIM launched a Strategic Plan Dashboard (available on the SIM SharePoint site). The most recent images of the dashboard screens are displayed in Figures 9 to 11.

Figure 9. Strategic Plan Progress: High-Quality Instruction

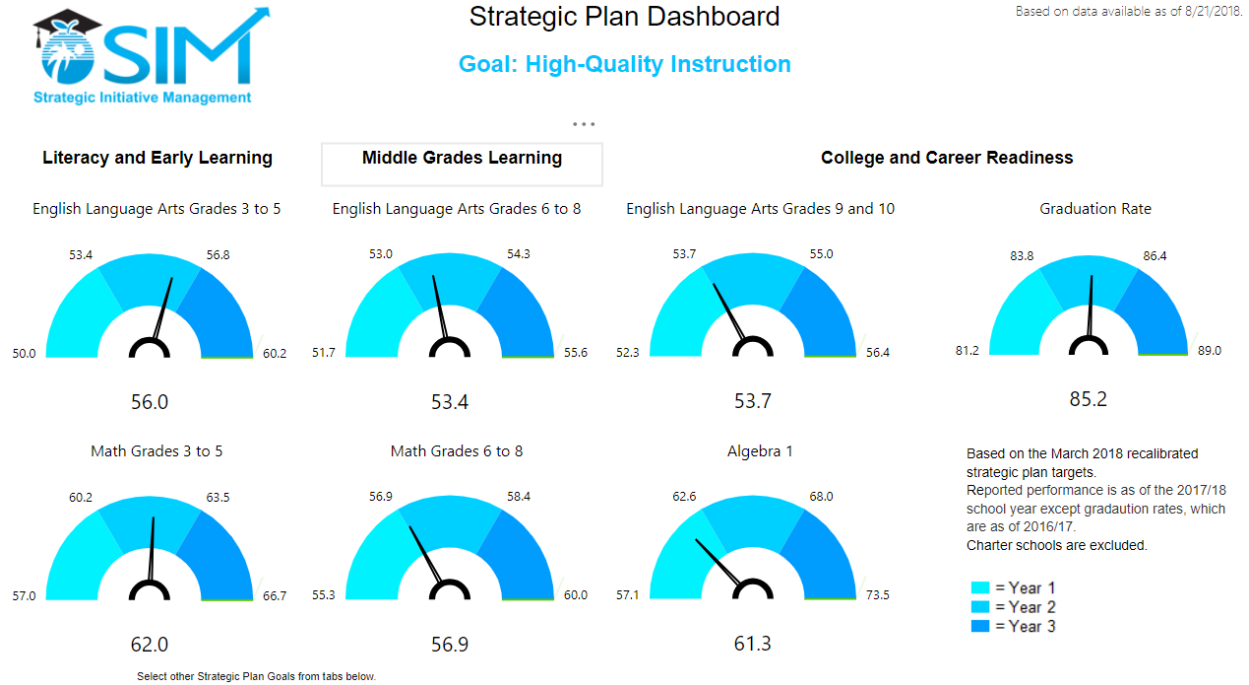


Figure 10. Strategic Plan Progress: Continuous Improvement

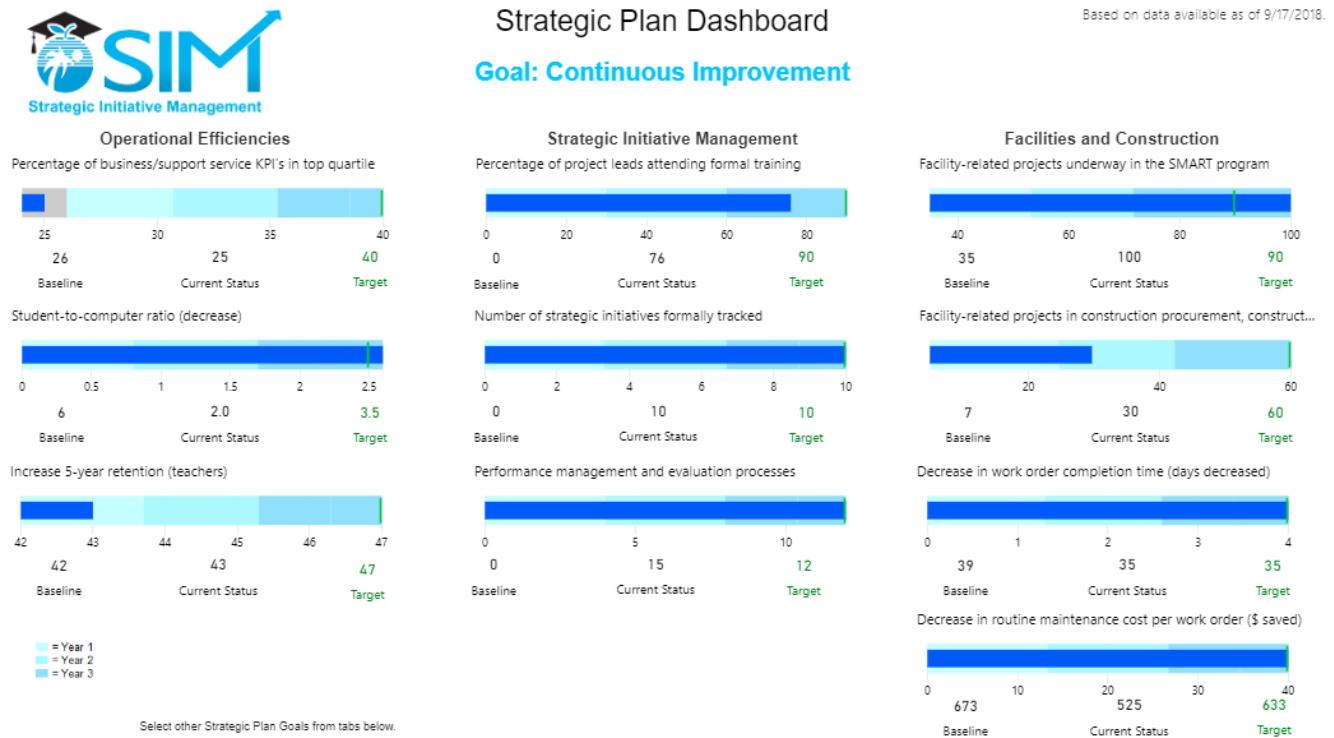


Figure 11. Strategic Plan Progress: Effective Communication



Early Literacy

The importance of literacy and early learning is a core focus of the District’s 2016/17 Strategic Plan and is the first of three strategic initiatives under Goal 1: High-Quality Instruction. Work within this initiative is driven by the Theory of Action that:

IF we assign highly-skilled teachers to grades K-2, deliver a balanced literacy curriculum, use high quality instructional materials, effectively engage families, and monitor progress with a common, unified assessment system, THEN on-grade level literacy will increase and FSA-ELA Level 1 scores will decrease in third grade for ALL students (including: race/ethnicity, gender, English Language Learner, students from disadvantaged backgrounds, students with disabilities, and gifted students).

Critical workstreams to implement the literacy and early learning initiative were organized around five tactics:

- Promote literacy prior to Kindergarten (**Birth to Pre-K**),
- Implement a **Balanced Literacy** framework in grades K to 2,
- **Performance** monitoring and analysis of student outcomes,
- Deploy necessary interventions using the Multi-Tiered System of Supports/Response to Intervention (**MTSS/Rtl**) framework, and
- **Quality Assurance** for school-based implementation.

Each workstream was coordinated by a Project Manager with expertise in the specific tactic employed. Together, the five tactics comprised the Literacy and Early Learning portfolio, which was managed by the

Executive Director of Early Learning/Language Acquisition. Details about the specific materials deployed through the Literacy and Early Learning Initiative can be acquired from the Early Learning/Language Acquisition office.

SIM Support & Facilitation

The SIM Office, including the Performance Management (PM) and Program Evaluation (PE) Departments (collectively: SIM) has been intimately involved with the facilitation of project plan development, data analysis and summarization, and communications to the School Board and Cabinet.

Project Plan Development. Each of the five workstreams were guided by detailed project plans developed by the Project Managers, Portfolio Manager, and facilitated by the SIM Team. The detailed project plans were approved by the Cabinet-level Executive Sponsors. The year 2 project plans focused on specific strategies:

- **Birth to Pre-K** focused on enhanced social-emotional development and relationships through professional development and deployment of the Conscious Discipline curriculum, supported through measurement (Classroom Assessment Scoring Systems and Teaching Strategies Gold) and enhanced engagement with families.
- **Balanced Literacy** continued the process of deploying the balanced literacy frameworks across the District with particular emphasis on professional development and acquisition of resources.
- **Performance** focused on the expansion of the use of Benchmark Assessment System (BAS) data to inform and improve practice.
- **MTSS/RtI** focused on development of MTSS/RtI guidance documents based on best practices, work with school-based leadership teams to develop and implement action plans.
- **Quality Assurance** implemented the “Look Fors” framework to inform and improve practice at the school sites.

Each project plan specified key tasks, milestones, and timelines, the development of which was facilitated through consultation with SIM.

Web Tools and Databases: Calibration Conversations Tool. Calibration Conversations are an integral component of training and support provided to schools by the literacy department. During Year 1 of implementation, tracking of participation was accomplished using paper sign-in forms, which diminished monitoring and reporting capabilities. To enhance these capabilities, SIM created an online tool using Microsoft Forms to enable centralized collection of information and increase flexibility and accuracy of reporting. Additional improvements will be forthcoming in Year 3.

Cabinet Update Facilitation

Risk Registers. On a monthly basis, SIM queried the Project Managers to provide a status update relative to the project plans. Based upon the feedback provided, SIM populated Risk Registers for each workstream that compared reported progress to the original project plan anticipated progress. Tasks with reported completion that varied by 25% or greater from the original project plan estimate were identified as at-risk. Each at-risk task was categorized (scope, effort, resources, or other) and next steps to address the situation were identified. These Risk Registers were reviewed during Cabinet Updates.

Project Manager Cabinet Rotation. Year 2 of the Literacy and Early Learning Initiative implementation was supported by presentations and discussion at regular Cabinet meetings. This year,

however, included the practice of rotating the Project Managers through the Cabinet meetings to allow for greater depth of discussion of each of the major workstreams. The SIM-facilitated rotation was:

- Quality Assurance on January 25, 2018
- Balanced Literacy and Performance on March 22, 2018
- Birth to Pre-K on March 26, 2018
- MTSS/Rtl on May 24, 2018

For each Cabinet update visit, SIM provided data summaries of key metrics and updated Risk Registers for all project workstreams.

Board Workshop Development. A Literacy and Early Learning update was presented during a School Board Workshop on December 12, 2017. This workshop was presented as the second part of a two-part session in conjunction with the Reimagining Middle Grades Workshop #2. The Literacy and Early Learning segment provided an update through Administration Period 1 (AP1). SIM coordinated the construction of the workshop PowerPoint slide deck, including summaries of key data. Topics included were: Professional Development, Calibration Conversations, AP1 BAS data, and year-to-year trends in BAS data. A second workshop was not conducted due to other pressing matters resulting from the February 14, 2018 events that unfolded at Marjory Stoneman Douglas High School. An end of year Board Workshop presenting Year 2 outcome data was presented to the School Board on August 14, 2018.

Data Analysis and Interpretation. SIM provided data analysis and interpretation support throughout Year 2 implementation through the tracking and reporting on key process and outcome metrics. In concert with key partners in Student Assessment and Research and Professional Development Standards and Support, data were tracked and reported in alignment with the BAS administration periods. These metrics included: Balanced Literacy Pathways Professional Development progress, BAS participation and performance, Calibration Conversation Visits, Kindergarten readiness, Literacy classroom environment “Look Fors”, and Progress Monitoring Plans. To aid Project Managers and OSPA staff in monitoring school progress and identifying schools for additional support, school level summaries of the data were compiled, and indicators created to highlight areas of concern. These summaries were disseminated following each BAS administration period. The next section provides details on the metrics and the Year 2 Outcomes. Additional analytics are presented following the set metrics to provide greater insight for the work that has been accomplished and illuminate areas for further attention going forward.

Year 2 Outcomes

This section details the process and outcome metrics for the second year of the District’s Literacy and Early Learning Strategic Initiative. The elementary level process outcome metrics (POM.e) and outcome metrics (OM.e) summarized in this section are organized by project workstream.

Birth to Pre-Kindergarten. Widely Held Developmental Expectations (OM.e.1) was assessed using Teaching Strategies GOLD (TSG), which is an observation-based assessment system that enables teachers to track student progress towards meeting developmental expectations. Nearly all District Head Start and Voluntary Pre-Kindergarten (VPK) students were assessed using TSG (participation rates exceeded 93%). Table 1 displays the percent of Head Start and VPK students meeting or exceeding developmental expectations in key literacy dimensions during the Fall and Spring of 2016/17 and 2017/18. Examination of the table indicates some year-to-year fluctuation in student performance; however, the most notable

decrease concerned *Writes to Convey Meaning*. This, and other fluctuations apparent in the table, may be due, at least in part, to the online scoring system that became effective during 2017/18.

Table 1
Percent Meeting/Exceeding Widely Held Developmental Expectations in Literacy: Four-Year-Olds, 2016/17 and 2017/18

	2016/17			2017/18		
	Fall	Spring	Change	Fall	Spring	Change
Head Start						
Letter Knowledge	59	100	41	66	97	31
Sound Knowledge	26	90	64	40	94	54
Print Concepts	66	98	32	43	93	50
Rhyme	34	94	60	19	86	67
Alliteration	60	97	37	36	89	53
Discriminate Units of Sound	80	98	18	46	86	40
Writes to Convey Meaning	63	98	35	28	84	56
Voluntary Pre-Kindergarten (VPK)						
Letter Knowledge	55	99	44	70	98	28
Sound Knowledge	38	94	56	47	94	47
Print Concepts	68	94	26	48	94	46
Rhyme	32	79	47	19	85	66
Alliteration	62	91	29	33	94	61
Discriminate Units of Sound	70	98	28	51	90	39
Writes to Convey Meaning	68	92	24	29	82	53

Source: Head Start/Early Intervention

Students Entering Kindergarten Ready for School (OM.e.2) were assessed for the first time using the new Florida Kindergarten Readiness Screener (FLKRS) Star Early Literacy in Year 2. This new assessment is based on the Renaissance Star reading assessment and is administered to all entering Kindergarten students during the first 30 days of the school year. Given this timing, the FLKRS Star Early Literacy may serve as an outcome measure for the Birth to PK efforts and as a leading indicator for the K-2 efforts (although reporting did not occur until May 2018 for this first year of implementation). Overall, 53.7% of Broward’s 17,692 Kindergarten students were identified as “ready” by scoring 500 or higher. Our students had a similar level of readiness as students across Florida (54.0%) and tended to have a higher level of readiness than Miami-Dade (50.4%), but slightly lower than Palm Beach (54.7%).⁴

The FLKRS Star Early Literacy assessment provides a literacy classification for each student in addition to the overall score. Students may be classified into one of four levels from the lowest performing category of *Early Emergent Reader* to the more advanced category of *Probable Reader*. Table 2 displays the percent of students in each category for the District overall and for major student subgroups. This early assessment detected gaps between student subgroups in literacy classification. As indicated in the table, students tended to obtain higher literacy classifications if they were White, from a more affluent socioeconomic background, did not have a disability, and were not English Language Learners (ELL).

⁴ Source: Florida Department of Education.

Table 2
FLKRS Star Early Literacy Classification, Entering Kindergarten Students 2017/18

Group	N	Literacy Classification			
		Early Emergent Reader	Late Emergent Reader	Transitional Reader	Probable Reader
Overall	17,791	42.2%	50.2%	6.3%	1.2%
Race/Ethnicity					
Black	6,617	48.9%	45.9%	4.4%	0.8%
Hispanic	6,228	45.2%	48.3%	5.6%	1.0%
White	3,633	28.5%	59.7%	10.0%	1.8%
Gender					
Female	8,679	38.3%	53.7%	6.9%	1.1%
Male	9,098	46.0%	47.0%	5.7%	1.4%
Free or Reduced Lunch Status					
FRL	12,401	49.5%	45.6%	4.3%	0.7%
Non-FRL	5,376	25.5%	61.0%	10.9%	2.5%
Student with Disability					
SWD	15,968	66.8%	29.6%	3.2%	0.4%
Non-SWD	1,809	39.5%	52.6%	6.6%	1.3%
English Language Learner					
ELL	4,286	61.5%	35.6%	2.7%	0.3%
Non-ELL	13,491	36.1%	54.9%	7.4%	1.5%

Source: Florida Department of Education

Balanced Literacy. Four professional development courses comprise the Balanced Literacy Pathway and are fundamental for all KG to 3 teachers to understand the design and implementation of the framework. The number and percent of teachers completing Professional Development Balanced Literacy Pathways (POM.e.1; BAS, POM.e.7) formed an essential metric as to the progress towards preparing K-3 teachers to provide instruction via this framework. The major emphasis has been on having teachers complete the training on the BAS administration and scoring as the initial step before teachers move on to Responsive Literacy Instruction, Balanced Literacy and Small Group Guided Reading. This difference in focus is apparent in Table 3, where more than half the English Language Arts and Reading teachers of students in grades KG through 3 have completed Professional Development on the BAS, but fewer than 20% have completed training in the remaining three courses in the pathway.

Table 3

Number & Percent of Teachers Completing Each Course in the Professional Development Balanced Literacy Pathway

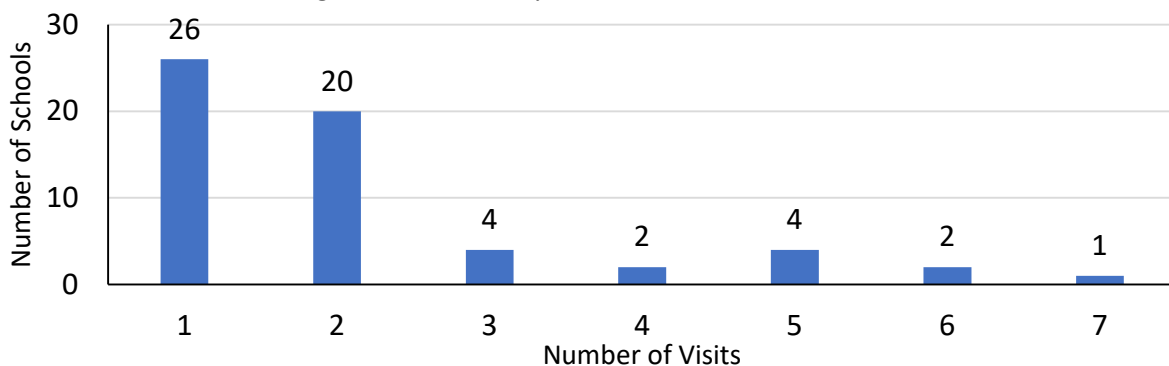
Grade Level	Total Teachers*	Benchmark Assessment System	Responsive Literacy Instruction	Balanced Literacy Workshop	Small Group Guided Reading
KG	970	60%	12%	16%	19%
1	999	60%	16%	16%	20%
2	1,101	55%	15%	15%	18%
3	1,209	52%	11%	11%	18%
4	1,361	42%	7%	10%	13%
5	1,364	42%	6%	9%	13%
Unduplicated Total**	5,106	53%	12%	13%	18%

* Teachers with assigned students for English/Language Arts and Reading.

** Does not equal column total as teachers may serve more than one grade level.

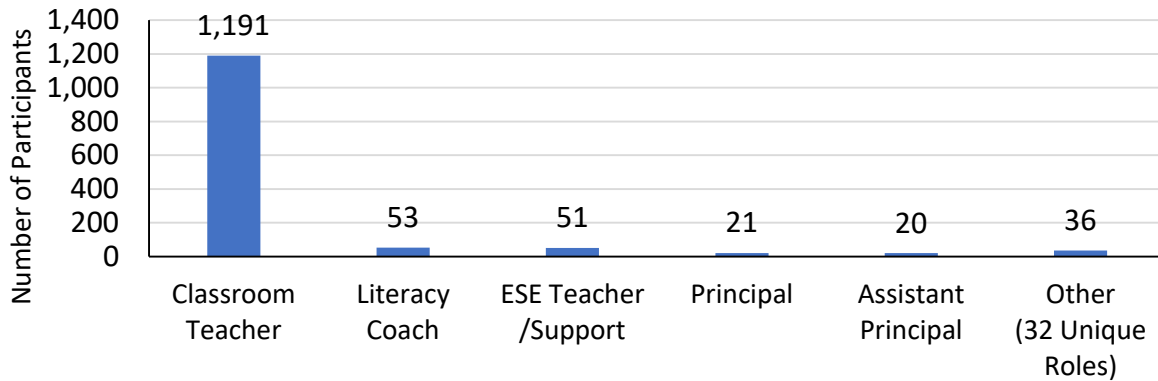
Calibration Conversations provided another layer of support and reinforcement to teachers who had successfully completed the BAS professional development. Figures 12 to 15 illustrate the reach of Calibration Conversations to date (number and percent of sites visited, POM.e.4; number of teachers reached, POM.e.3). A total of 59 (42%) unique schools were visited for Calibration Conversations during the 2017/18 school year; representing an increase from 33 schools during the 2016/17 school year. For the 2017/18 school year, SIM created an online tool to assist with the tracking of participation by Literacy staff. This tool has enabled more accurate and comprehensive reporting of Calibration Conversations participation at schools. Many of the 59 schools were visited on multiple occasions, with each one- to two-hour visit focusing on a specific grade level or instructional team as requested by the schools. Figure 12 shows the distribution of schools by the number of visits. Whereas 26 schools were visited one time, 33 schools were visited on multiple occasions with one school visited as many as 7 times resulting in 125 Calibration Conversation visits during the 2017/18 school year.

Figure 12. Schools by Number of Visits, 2017/18



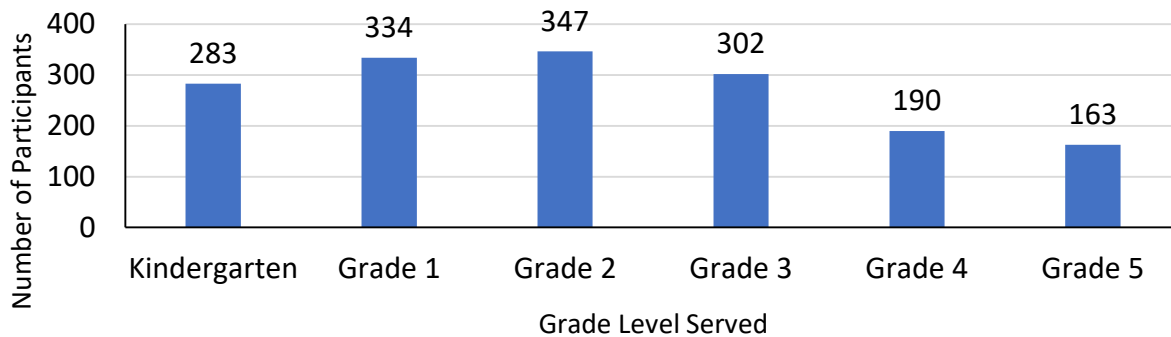
A total of 1,372 unique school staff have participated in a Calibration Conversation. The majority of these participants have been classroom teachers (N=1,191; 86.8%). Other participants have included Literacy Coaches, ESE Teachers/Support staff, and school administrators including principals and assistant principals.

Figure 13. Calibration Conversation Participants by Role, 2017/18



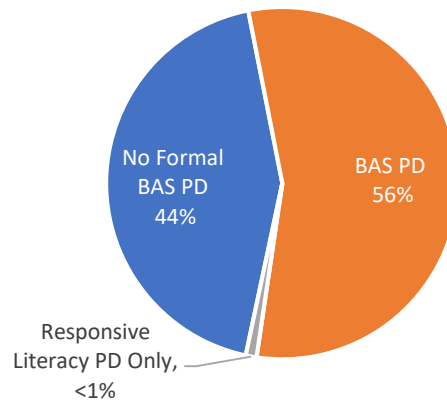
Calibration Conversation participants often reported serving more than one grade level; the range of elementary grade levels was represented with most concentration in the Kindergarten to Grade 3 range.

Figure 14. Calibration Conversation Participants by Grade Level Served, 2017/18



Calibration Conversations were designed to be a supplement to the Benchmark Assessment System Professional Development. Most of the participants had been prepared with having had BAS PD (56%) as intended. However, as shown in Figure 15, a substantial proportion had either not had any formal BAS PD (44%) and a small proportion had only taken the Responsive Literacy PD (< 1%).

Figure 15. Calibration Conversation Participants Completed Professional Development, 2017/18



Performance. BAS participation (POM.e.8). In an effort to decrease the amount of testing our students are subjected to, schools were provided direction from the Literacy Department for exempting students who meet specified criteria from BAS participation. Specifically, all students in grades Kindergarten to third and students in grades 4 and 5 who scored at Performance Levels 1 and 2 on the 2017 Florida Standards Assessment-English Language Arts (FSA-ELA) were required to participate during the first BAS Administration Period (AP1, August 31 to November 30, 2017). However, if students reached the end of grade level *instructional level* expectation, they were exempted from further required BAS participation during the 2017/18 school year. The BCPS instructional level expectations by progress monitoring calendar is displayed in Table 4. It should be noted that this guidance to use the end of year *instructional level* expectations means evaluating by a lower standard and deviates from previous expectations communicated by the Academics Department to focus on *independent* reading levels.

Table 4
BAS Instructional Level Expectations by Progress Monitoring Calendar

Grade	First Week	Assessment Period 1			Assessment Period 2			Assessment Period 3			Last Week
	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
K	N/A	A	A	A	B	B	C	C	D	D	D
1	D	E	E	E	G	G	H	I	J	J	J
2	J	K	K	K	L	L	L	L	M	M	M
3	M	N	N	N	O	O	O	O	P	P	P
4	P	Q	Q	Q	R	R	R	R	S	S	S
5	S	T	T	T	U	U	U	U	V	V	V

Source: Literacy Department

Table 5 below shows the number and percent of students participating in BAS for the three administration periods (AP) in grades KG to 3 during the 2017/18 school year. The table includes the participation among the non-exempt students during administration periods 2 and 3 as well as participation among the exempt students and overall. Review of the table shows that participation was high, exceeding 95%, for non-exempt students in all grade levels and APs. Although participation was lower among the exempt students, particularly at grade 3 with an approximately 60% participation rate, the majority of exempt students were still assessed on the BAS.

Table 5
Percent of Students Tested by Administration Period

Grade		Non-Exempt			Exempt		Total	
		AP1	AP2	AP3	AP2	AP3	AP2	AP3
KG	%	98.0	97.5	96.7	92.2	95.8	97.2	96.5
	n	14,280	13,640	10,835	675	3,388	14,315	14,223
1	%	98.4	98.1	97.9	76.0	88.9	96.2	95.6
	n	15,431	14,047	11,527	1,044	3,542	15,118	15,069
2	%	98.0	97.3	96.0	73.1	80.5	92.7	89.7
	n	15,657	12,637	9,193	2,232	5,247	14,869	14,440
3	%	97.4	96.6	95.7	59.0	61.0	88.6	81.8
	n	16,520	12,927	9,746	2,134	4,170	15,061	13,916

Source: BAS Implementation Monitoring Dashboards

The data in Table 5 above suggest that teachers see a value in continuing to use the BAS with students who meet exemption criteria, but they may be selective in identifying students who participate. For a closer examination of the teacher use of the BAS with exempt students, the proportion of teachers with students meeting the exemption criteria who proceed to assess vs. those who do not assess the students was examined. Table 6 below shows that the proportion of teachers who serve students who meet the exemption criteria and choose to not employ the BAS with those students, increases with grade level from less than 5% among Kindergarten teachers to nearly a quarter of grade 3 teachers. However, these data demonstrate that the majority of teachers choose to use the BAS with their exempt students. These data, however, do not indicate whether that choice is solely at the teacher’s discretion or whether other influences such as direction from school administration or other sources are at play.

Table 6
Teacher Use of BAS with Exempt Students by Administration Period

Grade	AP2			AP3		
	Teachers with Exempt Students <i>N</i>	Not Assessing		Teachers with Exempt Students <i>N</i>	Not Assessing	
		<i>n</i>	%		<i>n</i>	%
KG	239	10	4.2	641	16	2.5
1	307	37	12.1	668	44	6.6
2	571	100	17.5	823	100	12.2
3	539	126	23.4	828	184	22.2

The Information and Technology (IT) department provided fields in the District’s Behavioral and Academic Support Information System (BASIS) to record and track individual student BAS data. Teachers enter the student’s *instructional, independent, and frustration* levels into BASIS. On the basis of the instructional level and the date of BAS administration, BASIS generates a color code indicator to denote whether that student is on-track, approaching, or off-track (POM.e.9 – OM.e.6). Note that the accurate generation of these indicators is dependent on the accurate entry of both the BAS scores and the test date (see Table 6 above). Non-exempt students tend to fall behind as they progress from AP2 to AP3 in grades KG, 1, and 3 (Table 7 below). Fewer than 60% of all students tested were on-track by AP3, with the exception of grade 2 where 71% of students were on-track.

Table 7
Student BAS Status by Administration Period

Grade		AP1 (%)	Non-Exempt Only		All Assessed	
			AP2 (%)	AP3 (%)	AP2 (%)	AP3 (%)
KG	On Track	94.3	54.3	47.3	56.3	59.8
	Approaching	5.7	22.7	16.1	21.7	12.3
	Off Track	NA	23.0	36.6	22.1	27.9
1	On Track	49.4	54.4	46.7	57.3	59.0
	Approaching	12.1	8.7	17.3	8.1	13.3
	Off Track	38.5	36.9	36.0	34.4	27.7

(table continued)

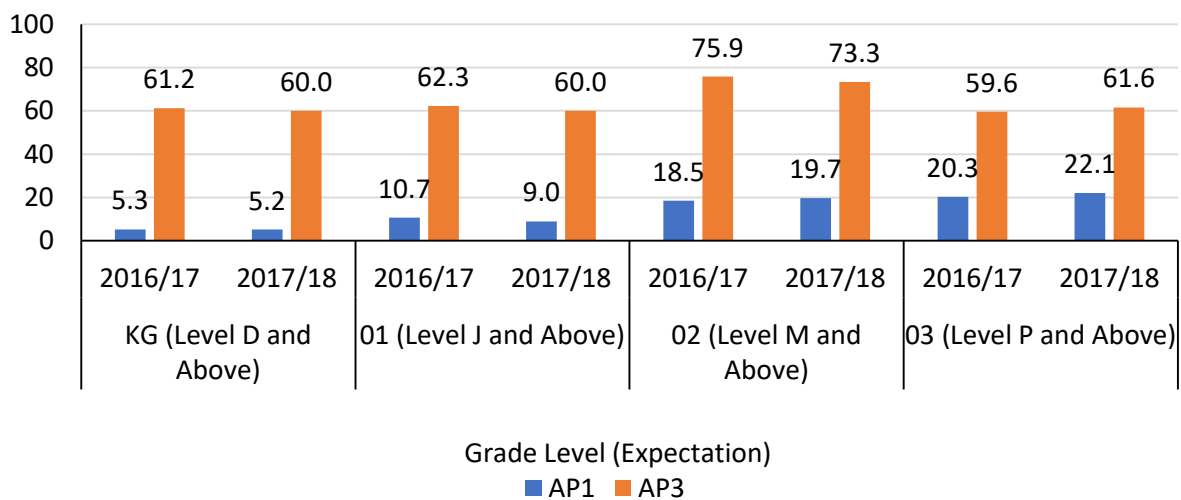
Table 7 (continued)
Student BAS Status by Administration Period

Grade		Non-Exempt Only			All Assessed	
		AP1 (%)	AP2 (%)	AP3 (%)	AP2 (%)	AP3 (%)
2	On Track	53.7	50.5	54.9	57.3	71.0
	Approaching	9.8	13.2	8.0	11.2	5.2
	Off Track	36.5	36.4	37.2	31.4	23.8
3	On Track	53.9	45.2	35.5	52.3	54.4
	Approaching	12.2	14.5	15.4	12.6	11.0
	Off Track	33.9	40.2	49.1	35.1	34.6

Source: BAS Implementation Monitoring Dashboards

The proportion of students meeting BAS end of year instructional level expectations is displayed in Figure 16 (OM.e.3). Exempt students who were not assessed are included in this summary as having met the end of year expectations for AP3. Grades K, 1, and 3 students grew substantially from AP1 to AP3 with 60% meeting expectations by the end of the year. Greater success was realized at grade 2 with more than 70% meeting end of year expectations.

Figure 16. Percent of Students Meeting End of Year Instructional Level Expectations, 2016/17 and 2017/18



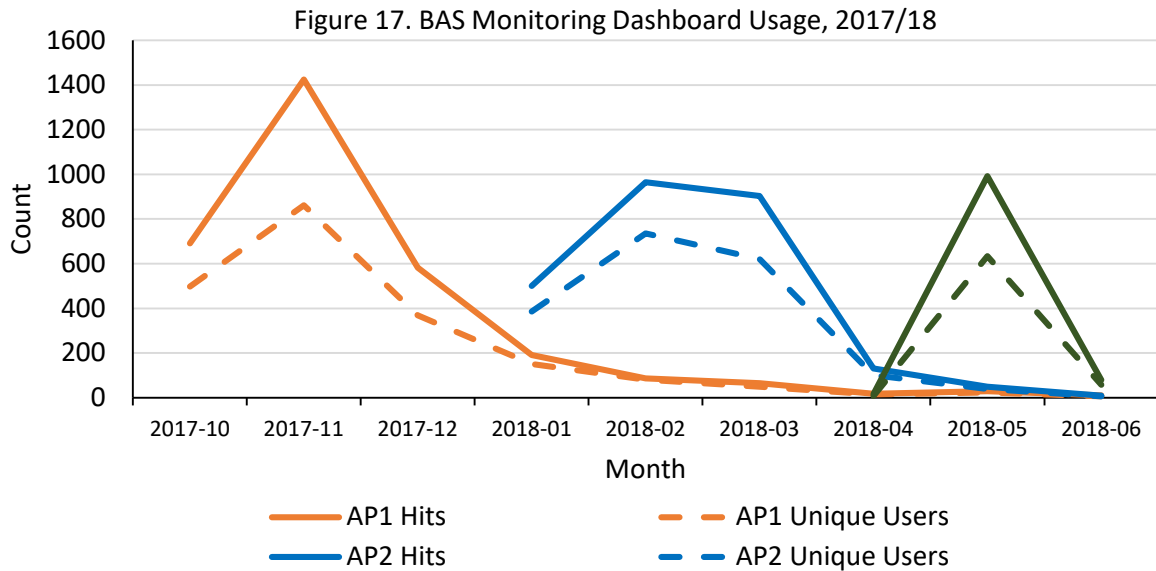
Grade 3 trends in performance on the FSA-ELA assessment are displayed in Table 8 (OM.e.4). The percent of students scoring at Level 3 or higher has increased year over year since the first administration of the FSA-ELA in 2015. Conversely, the proportion of students scoring at Level 1 has decreased each year during the same time interval. These patterns were apparent among all subgroups attending the District's Traditional schools and were largely apparent among students attending Charter schools.

Table 8
Grade 3 FSA-ELA Four-Year Trend Data Based on All Students Tested

	Level 1					Level 3 and Above				
	2015	2016	2017	2018	Delta	2015	2016	2017	2018	Delta
OVERALL	24	23	20	19	-5	52	55	57	59	7
Traditional	26	24	21	20	-6	50	53	56	57	7
Charter	17	16	15	14	-3	61	61	64	65	4
Traditional Schools										
BLACK	37	34	29	27	-10	34	39	42	45	11
HISPANIC	23	24	21	20	-3	51	53	56	58	7
WHITE	12	11	9	9	-3	70	71	75	75	5
SWD	56	52	44	45	-11	19	25	28	29	10
Non-SWD	20	20	17	16	-4	56	58	61	62	6
ELL	49	53	36	39	-10	19	21	35	30	11
Non-ELL	22	19	17	16	-6	54	59	62	63	9
FRL	33	31	27	25	-8	39	43	46	49	10
Non-FRL	11	10	8	8	-3	71	75	78	79	8
Charter Schools										
BLACK	25	25	22	19	-6	46	48	53	54	8
HISPANIC	14	13	12	12	-2	67	66	67	69	2
WHITE	10	8	7	6	-4	73	71	75	77	4
SWD	46	40	34	38	-8	28	30	38	35	7
Non-SWD	14	14	13	12	-2	63	64	66	67	4
ELL	40	42	30	33	-7	23	24	41	34	11
Non-ELL	15	13	11	10	-5	64	65	69	70	6
FRL	22	22	19	17	-5	51	52	56	58	7
Non-FRL	10	7	7	7	-3	74	76	76	77	3

SWD: Students with Disabilities; ELL: English Language Learner; FRL: Free or Reduced Lunch
Source: Florida Department of Education

Dashboards for monitoring participation and performance on the BAS were created using Microsoft Office Power BI (OM.e.13). These dashboards were housed on the Student Assessment and Research (SAR) SharePoint site and accessible to any stakeholders with District intranet credentials. Usage analytics were acquired from the SAR SharePoint site. Figure 17 displays the number of hits and unique users for the AP1, AP2, and AP3 BAS Monitoring Dashboard by month respectively. Each dashboard shows a peak in activity corresponding to the period leading up to and just after the end of each administration period. The AP1 dashboard realized the greatest activity in terms of the both number of hits (max =1,424) and unique users (max =826), with less activity for AP2 (max hits = 964; max unique users = 736) and AP3 (max hits = 992; max unique users = 633).



MTSS/RtI. The MTSS/RtI workstream is focused on ensuring that the unique instructional needs of all students are met. Table 9 below shows a disaggregated summary of the percent of students progressing 2 or more instructional levels from AP1 to AP3 by grade level (POM.e.10; OM.e.6). Comparing student subgroups, larger differences in progress were detected at the Kindergarten level between racial/ethnic subgroups, socioeconomic levels, ELL status, and exceptional student status. These differences in progress tended to decrease at first grade and reverse to some extent at second grade. At third grade, a gap was again evident between Black students and their peers while the socioeconomic status gap was only one percentage point. ELL students had reversed the trend to increase at a greater rate than their peers, and exceptional education students continued to lag behind. One consideration while reviewing these data is that students who were exempt on the basis of meeting end of year expectations during AP1 or AP2 and were not tested during AP3 are excluded from this table. By excluding the higher performing students, who may have attained increased BAS levels by AP3, may have artificially decreased gaps particularly at the higher-grade levels where larger proportions of exempt students were not tested.

Table 9

Percent of Students Progressing 2 or More Instructional Levels AP1 to AP3 by Subgroup

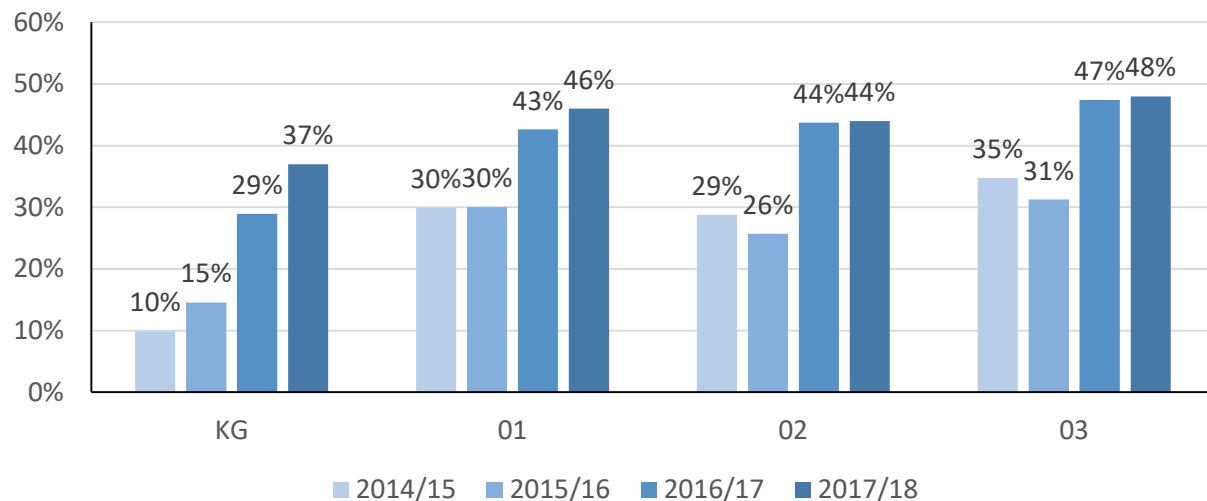
	Grade Level			
	KG	1	2	3
OVERALL	84.2	90.6	81.4	73.2
Black	81.4	89.6	81.4	70.3
Hispanic	82.5	90.7	83.3	75.7
White	90.1	92.8	78.8	74.9
FRL Student	81.5	90.2	82.6	73.0
Non-FRL Student	90.6	91.6	78.4	74.0
ELL Student	78.0	89.0	86.0	76.9
Non-ELL Student	86.2	91.1	79.9	72.3

ESE Student	64.1	78.5	77.5	69.5
Non-ESE Student	86.9	92.2	82.1	73.9

FRL: Free or Reduced Lunch; ELL: English Language Learner; ESE: Exceptional Student Education
 Source: BAS Monitoring Dashboards

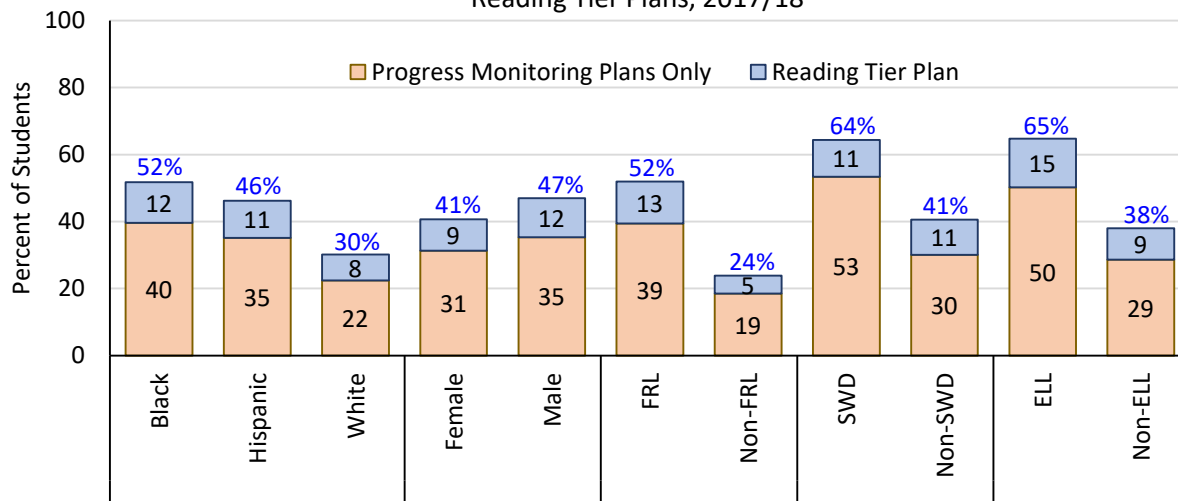
Students who are identified as struggling readers through performance on the BAS or other instruments at the teacher’s disposal are placed on a Progress Monitoring Plan (PMP). Parents are notified via letter that their child has been placed on a PMP along with the interventions to address identified deficiencies. Figure 18 displays the percent of students receiving PMP letters for reading (OM.e.5) for the 2014/15 to 2017/18 school years. Review of the data show that the proportion of students receiving PMPs has increased over the 4 years to more closely reflect the percentage of students scoring below satisfactory on the grade 3 FSA-ELA. This increase may be attributable to improved communication of district expectations to school staff and monitoring of students placed on a PMP, resulting in improved processes in the classrooms for accurately identifying and following up with students in need of support.

Figure 18. Students Receiving PMP Letters for Reading, 2014/15 to 2017/18



Students may need additional Tier 2 or Tier 3 interventions to address deficiencies. Figure 19 provides a disaggregated view of support and intervention by subgroup for the 2017/18 school year. Each bar shows the percent of students receiving a PMP only and the percent progressing to a tier reading plan. The combined figures are also shown to indicate the total proportion of students identified for intervention and support. As indicated in the figure, the proportion of students identified for support varied across subgroups. Those groups that tended to be identified for support were also the groups that tended to score lower on assessments of literacy and English language arts.

Figure 19. Level of Support Progress Monitoring Plans and Reading Tier Plans, 2017/18



Administered at the end of second grade, the Cognitive Abilities Test (CogAT) has traditionally been used by the District as a screening instrument to identify potentially gifted students. However, BCPS has adopted the CogAT as a standardized assessment that is administered to all students because it provides early information as to their overall status in the verbal, quantitative, and nonverbal domains. Table 10 provides the average scores for the three school years from 2015/16 to 2017/18 (OM.e.11).

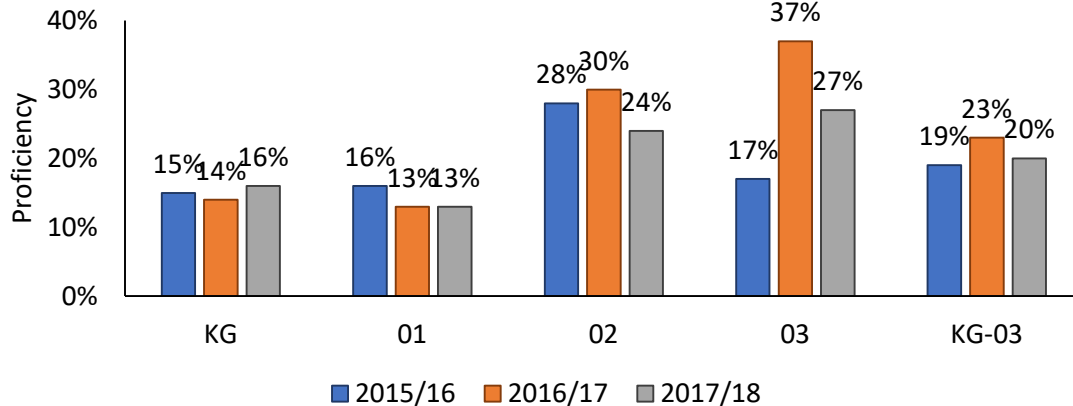
Table 10
CogAT 2015/16 to 2017/18

	School Year			Average Annual Percentage Point Change
	2015/16	2016/17	2017/18	
Verbal	93.9	93.3	92.3	-0.8
Quantitative	95.8	94.8	94.6	-0.6
Nonverbal	100.3	98.3	98.7	-0.8

Note: Includes all traditional and charter schools.
Source: Student Assessment and Research

Assessing Comprehension and Communication in English State-to-State (ACCESS): K-5 English for Speakers of Other Languages (ESOL) provides an indicator of language acquisition for our ELLs (OM.e.12). Performance level (PL) criteria were established for the ACCESS for ELLs 2.0 assessment during the 2016/17 school year and retrofitted to the 2015/16 scores. These criteria were used for the reporting of the ACCESS scores from 2015/16 through 2017/18 as displayed in Figure 20. Overall, the percentage of K-3 ELL students meeting proficiency criteria increased by 4 percentage points from 19% in 2015/16 to 23% in 2016/17 and decreased by 3 percentage points from 23% to 20% in 2017/18.

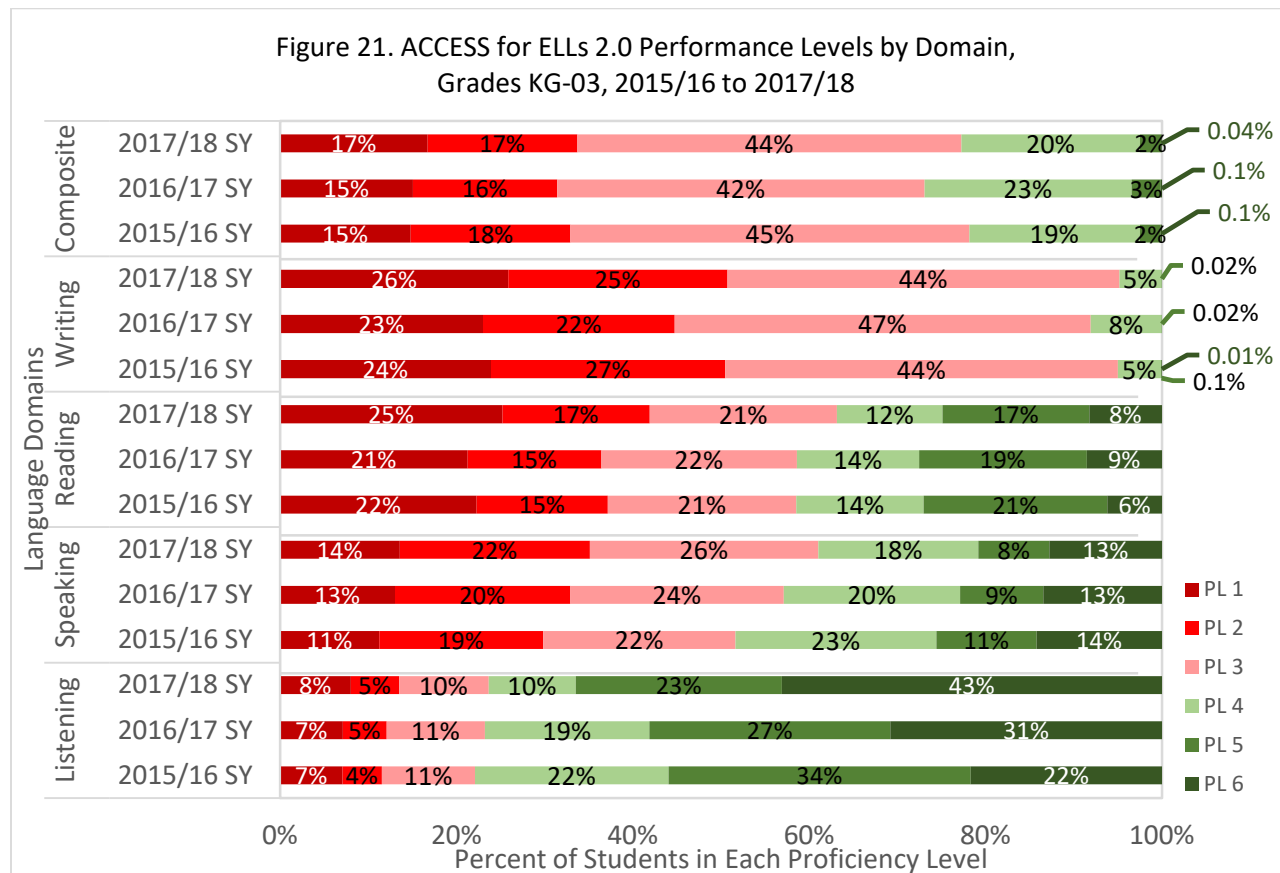
Figure 20. Proficiency Rates ACCESS for ELLs 2.0, 2015/16 to 2017/18



Source: ESOL Department

To be considered “proficient,” a student must score at Performance Level 4 or higher on the Reading domain sub score and on the overall Composite score. The ACCESS assessment measures proficiency levels from 1 to 6. Figure 21 displays performance according to domain (listening, speaking, reading, and writing) and for the composite score. The scores reflect increased difficulty for students at the more challenging domains (i.e., writing is the most challenging domain and is associated with the most students scoring in Performance Levels 1 to 3).

Figure 21. ACCESS for ELLs 2.0 Performance Levels by Domain, Grades KG-03, 2015/16 to 2017/18



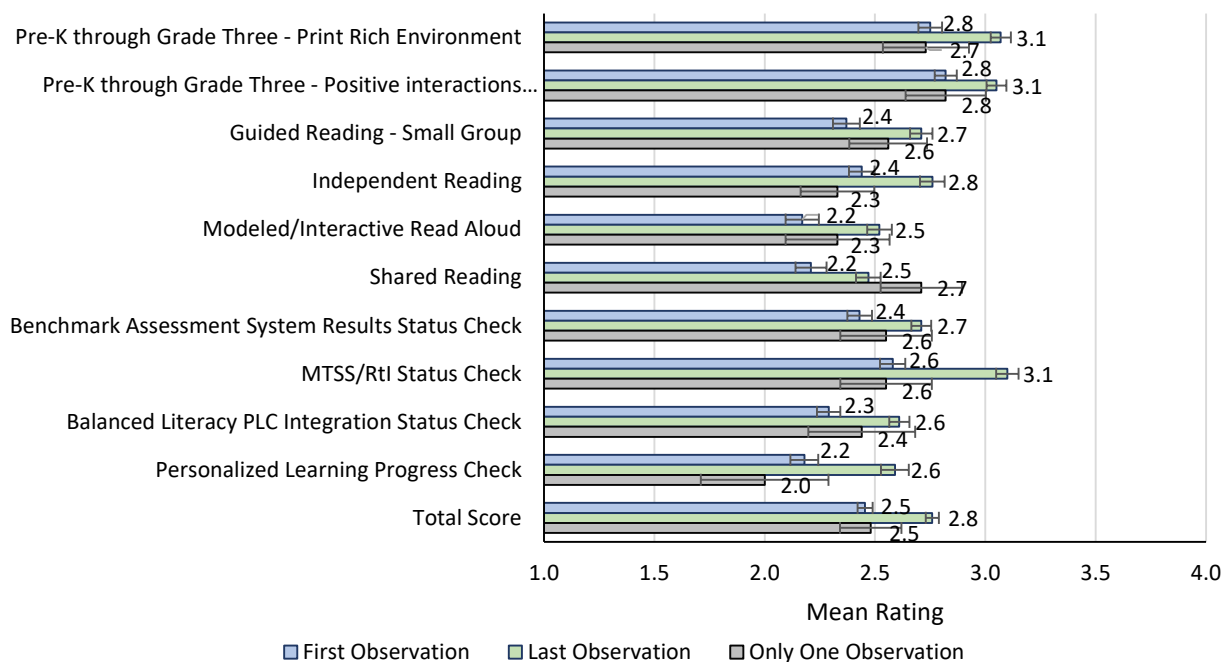
Source: ESOL Department

Quality Assurance. As part of the Quality Assurance effort, the Office of School Performance and Accountability (OSPA) Cadre Directors conducted site visits in the fall and spring to review the classroom environment related to balanced literacy instruction (POM.e.13). One hundred twenty-nine schools were observed on multiple occasions while 11 schools had only one observation recorded. Ten dimensions were assessed:

- Pre-K through Grade 3 - Print Rich Environment
- Pre-K through Grade 3 - Positive interactions between adults and students as well as between the students themselves
- Guided Reading - Small Group
- Independent Reading
- Modeled/Interactive Read Aloud
- Shared Reading
- Benchmark Assessment System Results Status Check
- MTSS/RtI Status Check
- Balanced Literacy PLC Integration Status Check
- Personalized Learning Progress Check

Each of these dimensions were holistically rated as *accomplished*, *evident*, *emerging*, or *no evidence*. In addition, the rater could indicate *not observed* given no opportunity to observe the dimension during the visit. Ratings were coded to a 4-point scale from 1 = *no evidence* to 4 = *accomplished*. Ratings of *not observed* were treated as missing data. The mean ratings are displayed in Figure 22 for the first (blue bars) and last (green bars) observations. Schools with one set of scores are also represented as gray bars. Review of the figure shows that in all categories, the scores increased from the first to last observations by an average of .3 points. The largest increase was observed with MTSS/RtI, from an average score of 2.6 to 3.1.

Figure 22. OSPA Early Literacy Classroom "Look Fors" 2017/18



Source: OSPA

Table 11 displays the distributions of number and percent of ratings for each “look for” for the first and last observation of the year. Ratings for schools within only one observation are also included. A substantial number of “Look Fors” were not observed during the first visit. For example, as many as 39 schools (30%) did not have opportunities to observe Modeled/Interactive Read Aloud and 33 schools (26%) did not have opportunities to observe Shared Reading. However, instances of *not observed* ratings decreased substantially by the last visits towards the end of the school year. From the first to last observation period, ratings increased toward *evident* and *accomplished* for all look for items.

Table 11
Distributions of “Look For” Ratings, 2017/18

Look For	Rating	Observation					
		First		Last		Only	
		<i>n</i>	%	<i>n</i>	%	<i>n</i>	%
Pre-K through Grade Three - Print Rich Environment	Not Observed	1	0.8%	1	0.8%	0	0.0%
	No Evidence	0	0.0%	0	0.0%	0	0.0%
	Emerging	44	34.1%	13	10.1%	4	36.4%
	Evident	72	55.8%	93	72.1%	6	54.5%
	Accomplished	12	9.3%	22	17.1%	1	9.1%
Pre-K through Grade Three - Positive interactions between Adults and Students as well as Between the Students Themselves	Not Observed	4	3.1%	2	1.6%	0	0.0%
	No Evidence	0	0.0%	0	0.0%	0	0.0%
	Emerging	33	25.6%	13	10.1%	3	27.3%
	Evident	82	63.6%	95	73.6%	7	63.6%
	Accomplished	10	7.8%	19	14.7%	1	9.1%
Guided Reading - Small Group	Not Observed	18	14.0%	3	2.3%	2	18.2%
	No Evidence	6	4.7%	1	0.8%	0	0.0%
	Emerging	62	48.1%	41	31.8%	4	36.4%
	Evident	39	30.2%	77	59.7%	5	45.5%
	Accomplished	4	3.1%	7	5.4%	0	0.0%
Independent Reading	Not Observed	21	16.3%	0	0.0%	2	18.2%
	No Evidence	2	1.6%	1	0.8%	0	0.0%
	Emerging	61	47.3%	42	32.6%	6	54.5%
	Evident	41	31.8%	73	56.6%	3	27.3%
	Accomplished	4	3.1%	13	10.1%	0	0.0%
Modeled/Interactive Read Aloud	Not Observed	39	30.2%	6	4.7%	2	18.2%
	No Evidence	12	9.3%	1	0.8%	1	9.1%
	Emerging	55	42.6%	64	49.6%	4	36.4%
	Evident	19	14.7%	51	39.5%	4	36.4%
	Accomplished	4	3.1%	7	5.4%	0	0.0%
Shared Reading	Not Observed	33	25.6%	2	1.6%	4	36.4%
	No Evidence	11	8.5%	1	0.8%	0	0.0%
	Emerging	58	45.0%	73	56.6%	2	18.2%
	Evident	23	17.8%	45	34.9%	5	45.5%
	Accomplished	4	3.1%	8	6.2%	0	0.0%

(table continues)

Table 11 (continued)
Distributions of “Look For” Ratings, 2017/18

Look For	Rating	Observation					
		First		Last		Only	
		<i>n</i>	%	<i>n</i>	%	<i>n</i>	%
Benchmark Assessment System Results Status Check	Not Observed	11	8.5%	0	0.0%	0	0.0%
	No Evidence	2	1.6%	0	0.0%	0	0.0%
	Emerging	68	52.7%	41	31.8%	6	54.5%
	Evident	43	33.3%	85	65.9%	4	36.4%
	Accomplished	5	3.9%	3	2.3%	1	9.1%
MTSS/RtI Status Check	Not Observed	15	11.6%	1	0.8%	0	0.0%
	No Evidence	0	0.0%	0	0.0%	0	0.0%
	Emerging	55	42.6%	15	11.6%	6	54.5%
	Evident	52	40.3%	85	65.9%	4	36.4%
	Accomplished	7	5.4%	28	21.7%	1	9.1%
Balanced Literacy PLC Integration Status Check	Not Observed	16	12.4%	1	0.8%	2	18.2%
	No Evidence	3	2.3%	1	0.8%	0	0.0%
	Emerging	77	59.7%	49	38.0%	6	54.5%
	Evident	30	23.3%	77	59.7%	2	18.2%
	Accomplished	3	2.3%	1	0.8%	1	9.1%
Personalized Learning Progress Check	Not Observed	22	17.1%	5	3.9%	2	18.2%
	No Evidence	12	9.3%	6	4.7%	2	18.2%
	Emerging	67	51.9%	48	37.2%	6	54.5%
	Evident	25	19.4%	61	47.3%	0	0.0%
	Accomplished	3	2.3%	9	7.0%	1	9.1%

Source: OSPA

Teacher success with helping students grow in their literacy acquisition, was assessed as the percent of K to 2 teachers with more than 60% of students registering “progress” of one or more BAS levels from AP1 to AP2 and from AP2 to AP3 (POM.e.28). Table 12 below shows the proportion of teacher successfully progressing 60% or more of their students. Success varies across grades levels with the most success realized between AP1 and AP2 at first grade; where the largest number of BAS levels are expected to be gained. However, by AP3 most teachers have realized successful increased in instruction levels (>90%) and in independent levels (>85%) in grades K to 2, success was lower among the grade 3 to 5 teachers.⁵

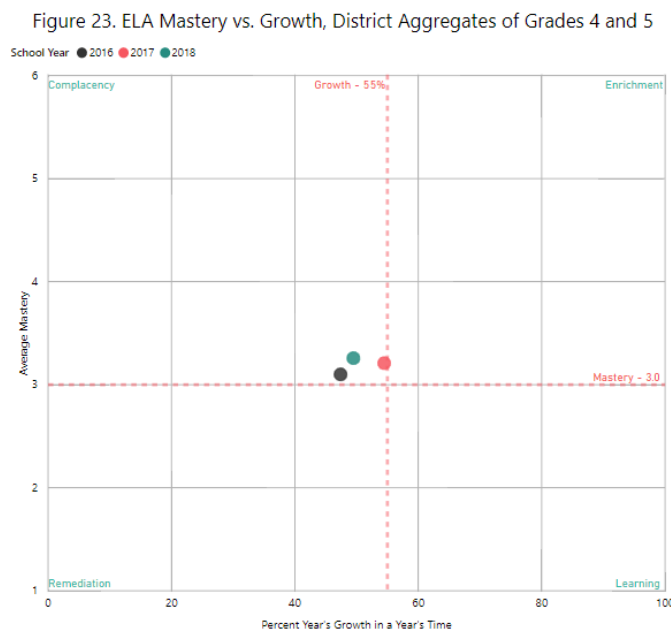
⁵ Excludes students who were exempt from BAS due to having reached end of year performance criteria.

Table 12
Number & Percent of Teachers with 60% or More Students Moving One or More BAS Levels, 2017/18

Grade	N*	Instructional				Independent			
		AP1 to AP2		AP1 to AP3		AP1 to AP2		AP1 to AP3	
		n	%	n	%	n	%	n	%
K	821	318	38.7	745	90.7	232	28.3	705	85.9
1	882	665	75.4	859	97.4	615	69.7	838	95.0
2	862	288	33.4	779	90.4	280	32.5	752	87.2
3	929	205	22.1	709	76.3	198	21.3	681	73.3
4	469	90	19.2	371	79.1	95	20.3	356	75.9
5	459	104	22.7	366	79.7	105	22.9	361	78.6

*Number of teachers identified as providing ELA or Reading instruction to 5 or more assessed students.

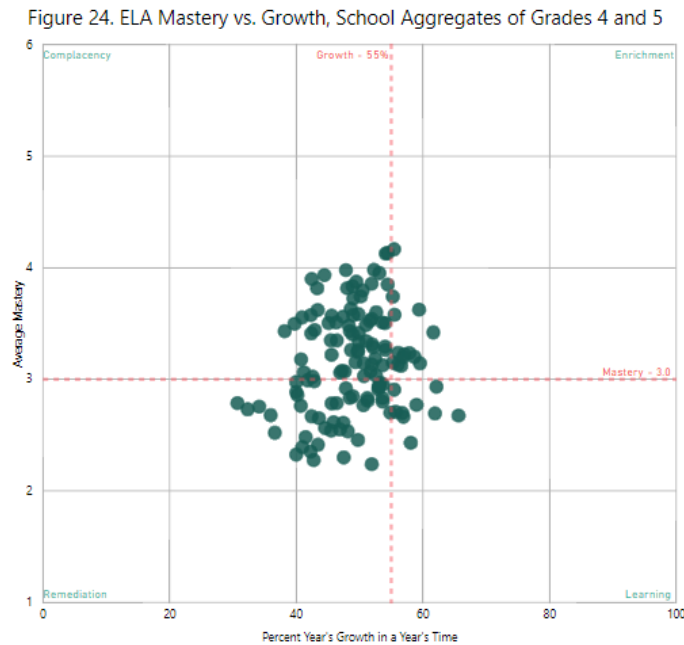
Fourth and fifth grade student performance on the FSA-ELA was assessed via the combination of mastery vs. growth matrix (OM.e.7). For this analysis, *mastery* scores are created for each student by proportionalizing the intervals within each performance level with respect to its corresponding scale score range. The mastery scores can range from 1.00 to 5.99. Whether a student attained a *year's growth in a year's time* was determined by examining the difference in mastery scores for non-retained students taking on-grade level assessments in contiguous years. A difference in mastery scores of 0 or greater indicated student growth. Figure 23 is derived from the Mastery and Growth Dashboard hosted by SAR. Overall, in 2018 the elementary schools obtained an average mastery score on 3.26 with 49.5% of students registering growth compared to aggregate mastery and growth of 3.21 and 54.8% in 2017 and 3.10 and 47.4% in 2016. As indicated in the figure, there has been a slight increase in mastery level from 2016 to 2018. However, improvement in year-over-year growth from 2016 to 2017 has largely declined from 2017 to 2018.



Source: Student Assessment and Research Mastery & Growth Dashboard.

However, performance in mastery and growth differs across schools. Figure 24 plots each schools' mastery and growth. By the joint consideration of the two coordinates, the majority of the schools fall in either

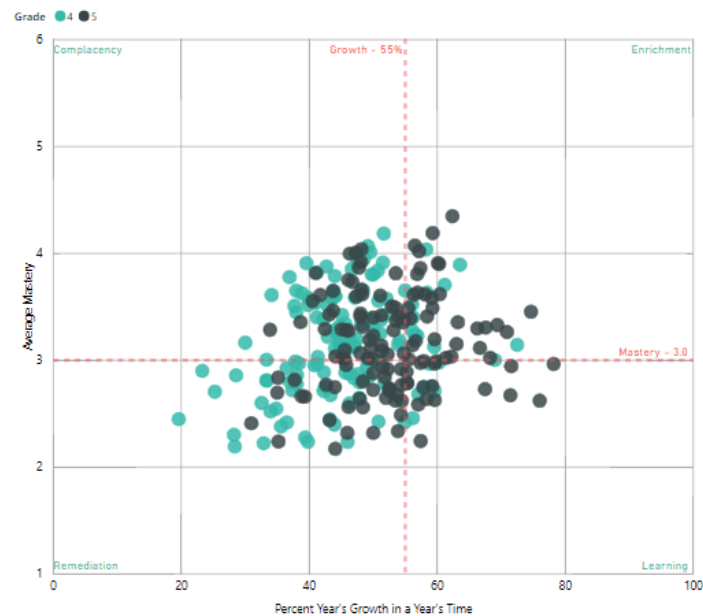
the complacency zone (schools with students scoring predominately at or above Level 3 on the FSA, but showing little year-over-year growth) or in the remediation zone (schools with students that score predominantly below Level 3 and show little year-over-year growth). Overall, 18% of the District’s non-charter elementary schools were successful at helping 55% or more students meet the growth criterion, this is down from 44% in 2016/17.



Source: Student Assessment and Research Mastery & Growth Dashboard.

These data can be disaggregated further to show each school’s mastery and growth by grade level. Figure 25 shows that, as a group, fifth grade students tend to more successfully register growth relative to their fourth-grade schoolmates. This pattern is similar to fourth vs. fifth grade pattern observed in 2016/17. However, the proportion of schools exhibiting success at meeting the 55% criterion was lower for both grade levels in 2017/18. Whereas 14% and 37% of the schools were successful with their fourth and fifth grade students, respectively, in 2017/18, these proportions were lower than the 26% and 66% observed in 2016/17.

Figure 25. ELA Mastery vs. Growth, School Aggregates by Grades 4 and 5



Source: Student Assessment and Research Mastery & Growth Dashboard.

Additional Analysis

Figure 26 displays the data for third grade students who took the BAS at administration periods 1, 2, and 3, the Broward Standards Assessment (BSA), and FSA. To be included in this figure, students had to have all scores, although students who were exempt from BAS at AP2 and/or AP3 are included as meeting the end of year expectation. The data are disaggregated by the major subgroups. Major observations include:

- BAS performance as indicated by the percent meeting end of year expectations (instructional level “P”) increased from AP1 to AP3 for all subgroups.
- More students tended to meet the End of Year criterion on the BAS AP3 than met satisfactory scores on the BSA or FSA; this is expected given difference in the scope of the BAS relative to the standards-based assessments.
- The predicted performance registered on the BSA was similar to the actual FSA performance for all subgroups.
- Gaps are evident for BAS, BSA, and FSA when comparing across subgroups.

Taken together, these data re-affirm the validity of the BAS for tracking student progress and identifying performance gaps that are predictive of standards-based assessment performance.

Figure 26. Grade 3 Students Meeting End of Year Expectations on BAS AP1, AP2, AP3; BSA, and FSA, 2017/18

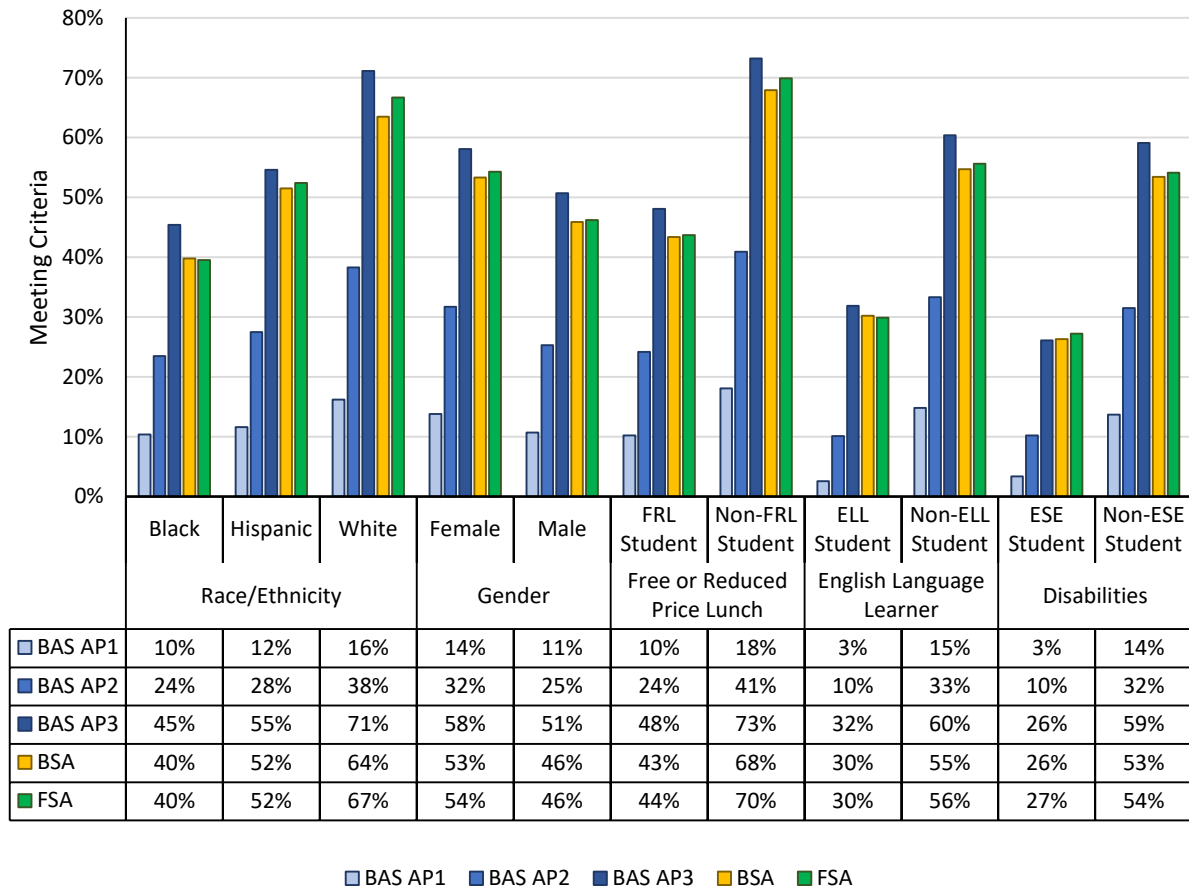
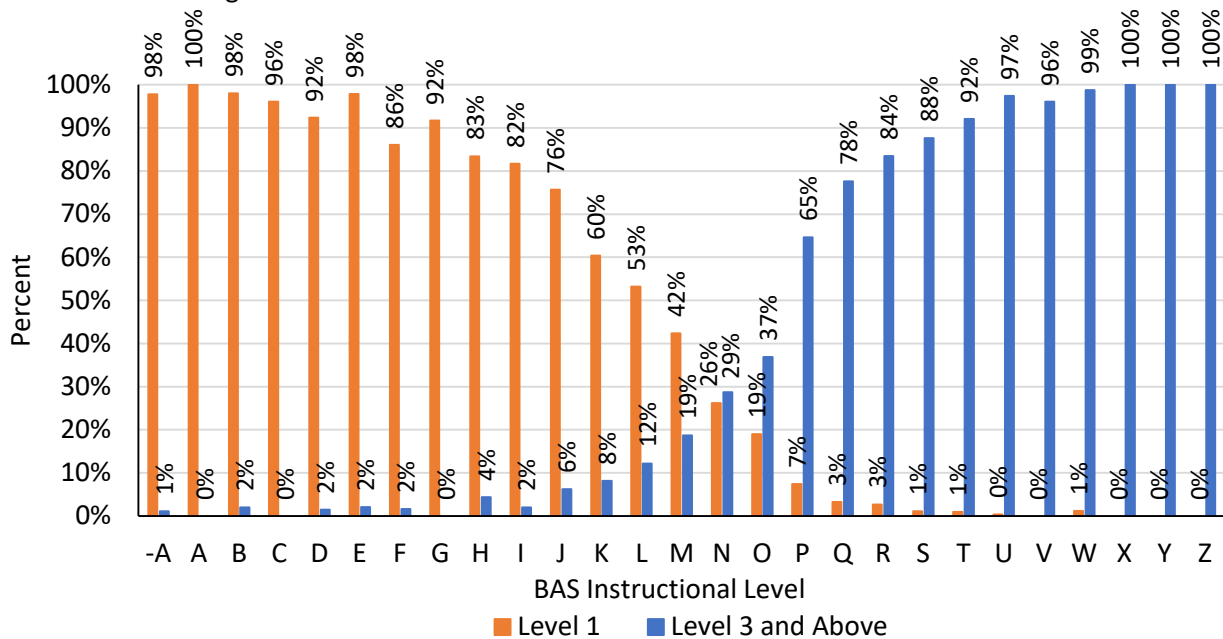


Figure 27 below shows the BAS AP3 instructional level and FSA performance. The orange bars indicate the percent of students at each BAS instructional level who scored Level 1 on the FSA, the blue bars represent the percent scoring at Level 3 or above. Level “P” is the end of year expectation.⁶ Examination of the figure revealed that the orange bars decrease, and the blue bars increase with higher BAS instructional levels. By Level “P”, two-thirds of the students were scoring at or above Level 3 on the FSA, and only 7% were scoring at Level 1.

⁶ In 2016/17, an *independent* level “P” was identified as the end of year expectation. In 2017/18, the expectation communicated to schools was *instructional* level “P”, which is a lower criterion. Schools were informed that they did not have to administer the BAS to students if they had previously obtained the end of year instructional level expectation.

Figure 27. Grade 3 FSA Performance vs. BAS AP3 Instructional Level



For 2017/18, SIM began pilot development of Early Literacy Environment dashboard. This tool provides school-by-school summarization of various early literacy metrics that could be used by the project managers and staff to identify schools in need of support and to help examine impact of services. Figure 28 below provides a snip of a segment of the tool. Each row provides information for one school, columns represent a selection of key indicators tracked. A composite index is computed across the key indicators to provide a simple metric of each school’s literacy environment. The value of each indicator is color-coded to aid identification of areas of strengths and concerns. The dashboard was updated with each of the three administration periods, with adjustment in content. This first-year development and pilot work was conducted in excel spreadsheets. SIM is planning to create the next generation summary using dedicated dashboarding tools like Power BI.

Figure 28. Example of Developmental Version of the Early Literacy Environment Dashboard

INDEX	OUTCOMES				Had Calibration Visit? (Y2=visit this year)	OSPA Look Fors	BAS On Track Indicators of Students Increasing 2 or More Instructional										Professional Development Benchmark Assessment								
	PRT		LEVEL				Score Excluding "Not Observed"	MTSS/Rtl Percents		KG			GD 1			GD 2			GD 3			Grade KG	Grade 1	Grade 2	Grade 3
	Grade 1 - % at or Above 55%	Grade 2 - % at or Above 65%	Percentage in Level 3 or Above	Level 1				PMP	Read Tier Plan	ON TRACK	ON TRACK	ON TRACK	ON TRACK	KG AP1 to AP3	GD 1 AP1 to AP3	GD 2 AP1 to AP3	GD 3 AP1 to AP3	GD 4 AP1 to AP3	GD 5 AP1 to AP3						
1.15	90	94	95	1		2.9	16.9	3.4	90.6	85.7	92.9	95.2	90.6	95.2	48.2	50.0	72.7	91.7	100.0	100.0	87.5	87.5			
0.88	97	87	94	1	Y2	2.8	22.1	7.4	93.2	79.3	93.1	91.4	93.9	93.2	81.0	83.7	85.7	100.0	20.0	20.0	80.0	50.0			
0.81	83	86	83	4		2.9	24.7	7.2	80.4	77.8	92.6	83.8	90.9	89.5	77.3	79.5	88.1	61.3	71.4	85.7	37.5	71.4			
0.67	84	80	65	7	Y2	2.9	25.5	13.1	70.2	58.2	75.5	55.0	81.7	95.4	84.9	72.9	63.2	87.1	85.7	100.0	85.7	66.7			
0.57	73	83	65	15		2.8	41.1	7.9	59.7	77.5	72.2	68.4	82.4	92.0	75.0	71.3	74.4	100.0	100.0	83.3	66.7	77.8			
0.50	85	83	81	7	Y	2.9	29.9	8.7	79.5	74.0	68.3	60.9	94.4	89.4	78.7	61.9	36.4	85.7	75.0	80.0	71.4	42.9			
0.50	89	80	76	4		2.8	18.2	8.3	70.2	86.7	93.8	87.6	91.4	98.0	62.9	77.1	100.0	100.0	30.8	30.8	38.5	38.5			
0.15	67	67	60	16	Y2	2.5	28.7	13.7	71.8	53.7	82.1	31.3	88.0	95.9	74.7	64.5	73.1	88.0	71.4	57.1	62.5	25.0			
0.15	85	82	76	9		2.6	23.8	6.5	61.6	64.6	66.0	53.4	85.2	88.0	60.9	94.5	84.2	56.5	71.4	71.4	14.3	16.7			
0.12	48	60	57	20	Y2	2.6	43.0	5.6	59.0	59.4	63.0	60.8	83.3	93.1	80.3	88.2	46.4	81.8	71.4	57.1	20.0	50.0			
0.03	56	47	40	33	Y2	2.7	60.3	11.0	55.6	47.1	57.4	59.8	75.7	91.8	92.9	76.6	69.8	62.5	83.3	83.3	100.0	63.6			
-0.17	62	69	41	37	Y2	2.2	61.5	17.8	34.5	49.3	61.2	19.6	77.1	84.2	80.0	74.5	64.4	54.9	100.0	100.0	100.0	33.3			
-0.26	71	35	38	28		2.3	62.9	3.5	53.8	40.8	51.4	28.4	87.0	86.8	93.4	70.7	92.0	45.2	66.7	50.0	20.0	28.6			
-0.43	44	47	31	37	Y2	2.7	66.4	16.0	55.2	40.7	58.5	44.6	84.6	85.2	100.0	82.3	63.5	65.9	75.0	75.0	100.0	33.3			
-0.58	60	63	41	29	Y2	2.1	50.7	14.5	61.1	34.0	66.7	43.9	50.0	73.9	84.1	75.0	82.6	59.5	0.0	66.7	66.7	75.0			
0.36	62	65	39	34		2.4	48.4	1.3	63.7	50.9	84.1	55.1	84.7	93.4	93.1	85.4	78.8	33.3	100.0	85.7	66.7	77.8			
0.04	68	56	47	30		2.7	56.5	11.0	58.6	73.3	78.8	54.7	75.9	97.2	87.8	69.7	60.0	84.1	83.3	50.0	66.7	87.5			

The compilation of data for the dashboard allowed examination of the impact of some key levels on literacy outcomes. Specifically, for each school we created an index of literacy outcomes by combining the percent of first and second grade students who met the end of year Primary Reading Assessment (PRT) for their respective grade levels with the percent of students in third grade who scored at Level 3 or higher. The relationships of this index to key levels including the BAS performance, OSPA “Look Fors,” professional development, calibration conversations, and progress monitoring plans were examined.

Figure 29 shows BAS performance is substantially correlated with the aggregated end of year ELA performance ($r=0.73$) reaffirming the validity of the BAS for predicting end of year assessment performance. The instructional environment was evidenced to have an impact on the literacy outcomes (see Figure 30) as the higher OSPA “Look for” scores were substantially correlated with the end of year outcomes ($r=0.44$).

Professional development (PD) was also found to have a moderate correlation with outcomes (see Figure 31, $r=0.25$). This correlation needs to be interpreted tentatively; this analysis included teachers who have completed all requirements to earn credit for PD and may have taken PD at any point in time during the year, even late in the year. Other teachers may have attended PD and implemented associated practices in the classroom but did not complete all requirements to earn credit. Further analysis will be needed to understand impact of PD for practice in the classroom.

Progress Monitoring Plans were strongly negatively correlated with the end of year outcomes (see Figure 32, $r=-0.79$). This pattern is to be expected as the lower performing students as indicated by BAS and other interim measures correlated with end of year assessments trigger the need for a PMP. The effectiveness of PMPs (and high tier interventions) for addressing individual student deficiencies will be a topic of future analysis.

Figure 29. End of Year ELA Performance vs. BAS AP2 Performance

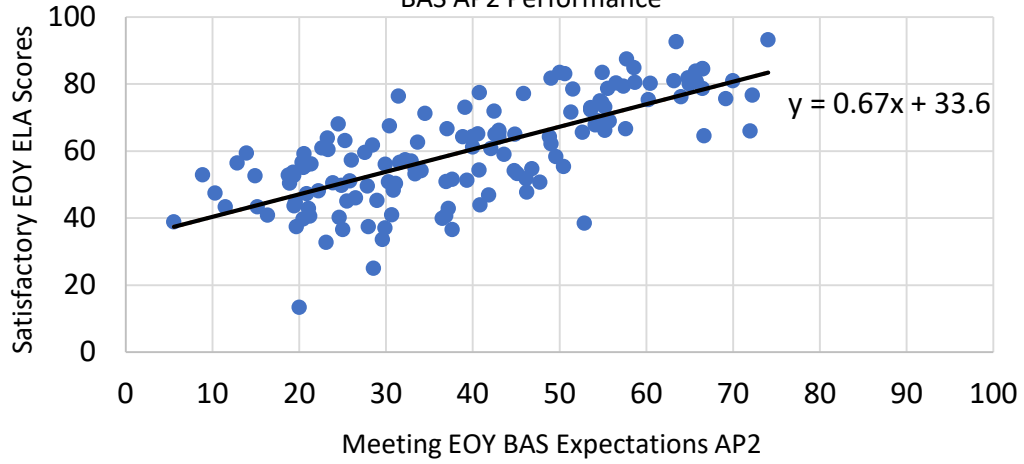


Figure 30. End of Year ELA Performance vs. OSPA "Look Fors"

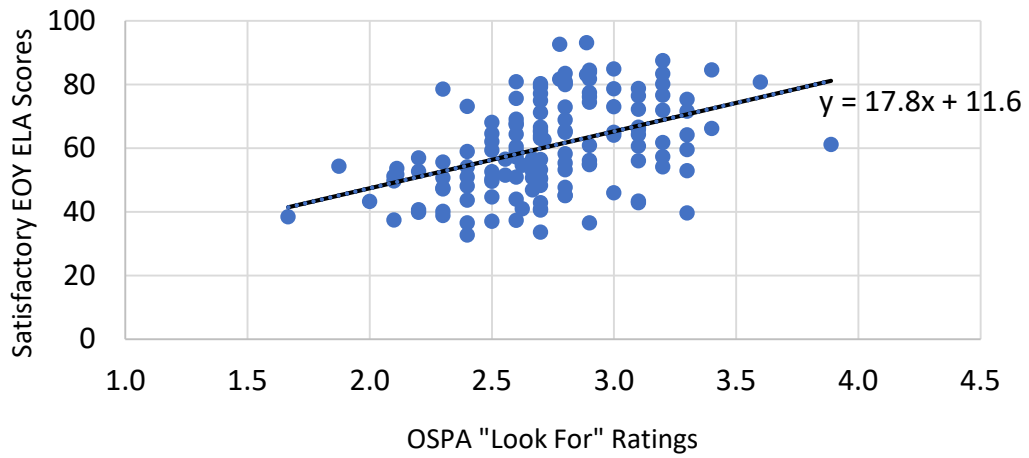


Figure 31. End of Year ELA Performance vs. Professional Development

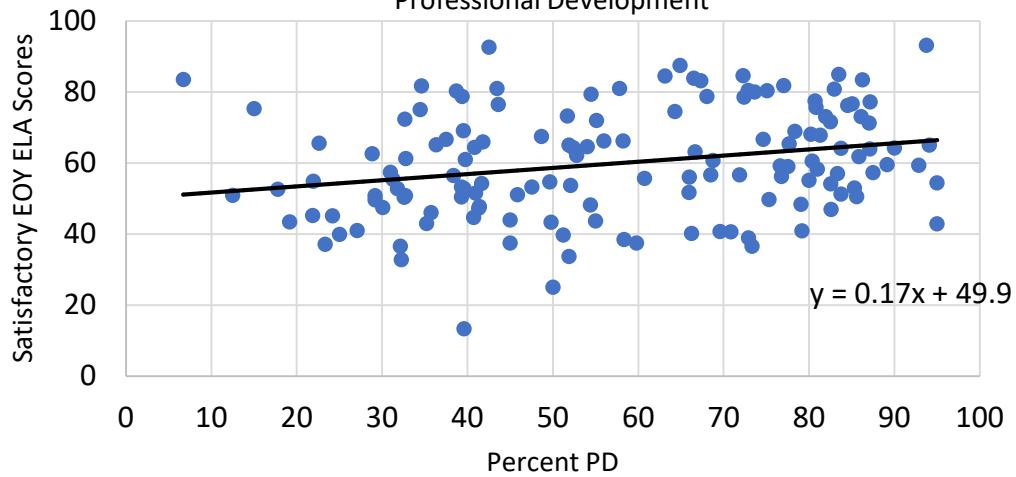
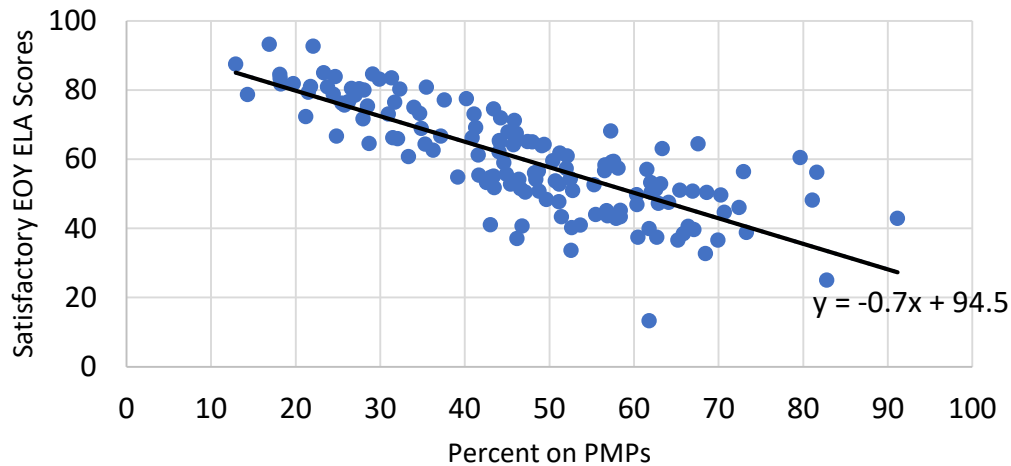
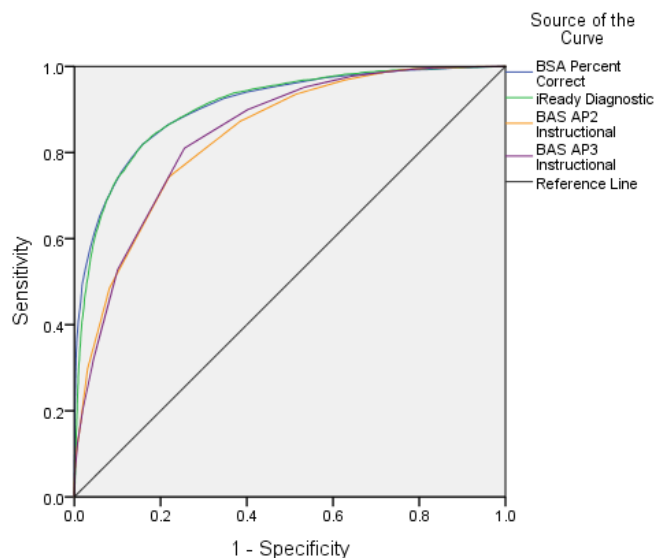


Figure 32. End of Year ELA Performance vs. Proportion on Progress Monitoring Plans



Many schools supplement or supplant BAS and BSA with interim assessment provided from other third-party vendors. To take a first look at one common assessment, iReady, in relation to the BAS and BSA, the receiver operator curves (ROCs) were examined. The ROC compares the probability of correct classification (sensitivity) with the probability of a false classification (1-specificity). For the current investigation, we are interested in the relative ability of the BAS, BSA, and iReady Diagnostic to predict students who will score at or above Level 3 on the FSA. Figure 33 shows the curves for third grade students in 2017/18. Curves that extend further to the upper left are associated with better performance for making the discrimination in later FSA scores. The BSA and iReady (blue and green curves) showed virtually identical performance and tended to show better discrimination than the BAS at AP2 or AP3. The finding that BSA and iReady performed better than the BAS for predicting FSA is not surprising given the difference in scope and content. However, the iReady assessment did not show an advantage over the District’s BSA.

Figure 33. Comparison of ROC Curves



Reimagining Middle Grades

The District’s focus on Reimagining Middle Grades (RMG) highlights the critical importance of supporting students’ adolescent, social emotional and academic development during this pivotal life stage. Current research has indicated that students who are not at expected proficiency levels when exiting eighth grade will have many hurdles in securing the life readiness skills needed for careers and college. The RMG initiative, aligned with Goal 1: High-Quality Instruction of the District’s 2016/17 Strategic Plan, focuses on student engagement to support academic proficiency and social emotional wellbeing resulting in improved outcomes and learning environments for all young adolescents. Work within this initiative is driven by the Theory of Action that:

IF we redesign the middle grades experience so that ALL students engage in project- and problem-based interdisciplinary learning, are supported in a warm environment where their unique educational needs are met, and have an opportunity to express themselves in all academic content areas, THEN on-grade level performance will increase in both English-Language Arts (ELA) and Mathematics and they will transition successfully to high school (including: race/ethnicity, gender, English Language Learner, students from disadvantaged backgrounds, students with disabilities, and gifted students).

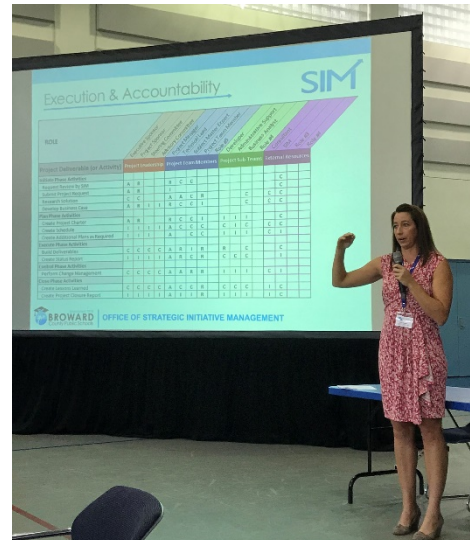
Critical workstreams to implement the RMG initiative are organized around six tactics:

- Redesign middle grades experience to be organized around project- and problem-based interdisciplinary learning (**PBL**),
- Embed Social Emotional Learning (**SEL**) standards and metrics in middle grades learning,
- Connect **MTSS/RtI** with graduation readiness metrics,
- Embed literacy support to include **applied learning** as a form of expression in all content areas,
- Align community needs and preferences with a well-planned **induction of new school prototypes**, and
- **Quality Assurance** for school-based implementation

Each workstream is coordinated by a Project Manager with expertise in the specific tactic employed. Together, the six tactics comprise the RMG portfolio, managed by one of the Cadre Directors – Middle Schools. Details about the specific materials deployed through the RMG Initiative can be acquired from the Office of School Performance and Accountability (OSPA).

SIM Support & Facilitation

The SIM Office, including the Performance Management (PM) and Program Evaluation (PE) Departments (collectively: the SIM Team) has been closely involved with the review and documentation of existing practices and data, development of proposals, identification of deliverables, data analysis and

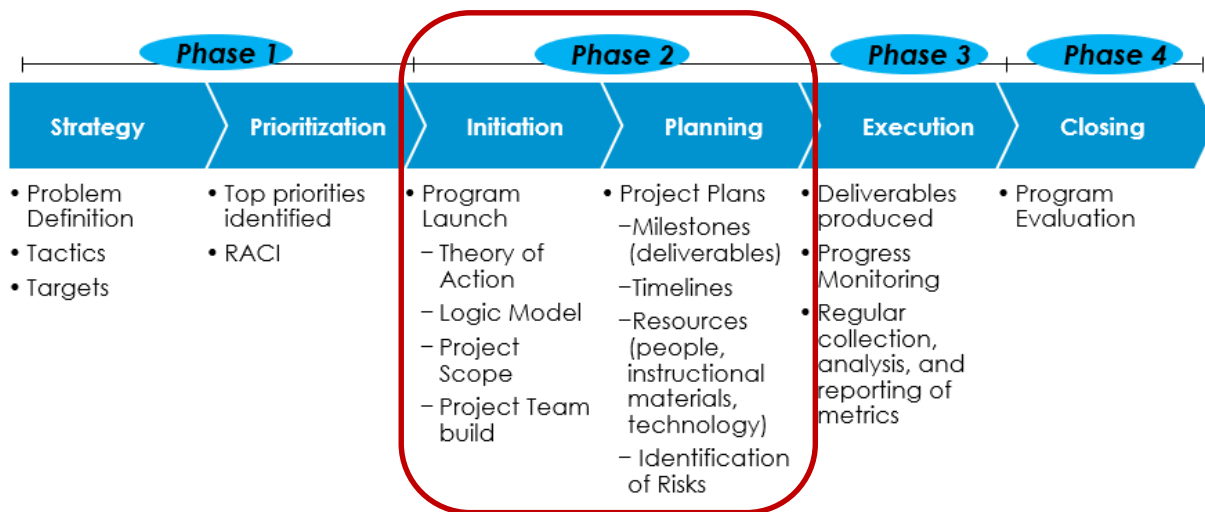


Leigh Kamens, Coordinator of Performance Management, presenting at the Continuous Improvement Conference 2018 at Broward College on July 30, 2018.

summarization, project plan development, and communications to the School Board and Cabinet. The 2017/18 school year was the first full year of focus on the RMG initiative.

Project Management Lifecycle: The RMG Initiative in the 2017/18 school year, was largely focused on the Initiation and Planning phases of the Project Management lifecycle. This lifecycle, illustrated in Figure 34, is a universal approach of dividing a project into clearly defined phases and the expected outcomes of each phase. Phase 1 (Strategy and Prioritization) was accomplished as part of the creation of the District’s 2016-19 Strategic Plan. The focus for 2017/18 school year was the Initiation and Planning phase of the Project Management lifecycle and arguably is the most pivotal and impactful portion of the process. Successful execution of a project is contingent on the depth and quality of coordination and planning happening at the forefront. During Phase 2, the RMG project teams worked intensively and collectively on determining the Theory of Action, Logic Model, project scope, project team composition and defining deliverables, timelines and resource needs to accomplish their vision. Throughout this process, the SIM team participated in planning activities, supplied toolkits, facilitated workshops and provided strategic consultations. The starting challenge for the RMG initiative was tackling what is meant to “Reimagine” the middle grades and networking with stakeholder groups to determine a collective definition. The RMG initiative moves into Phase 3 Execution for the 2018/19 school year.

Figure 34. Project Management Lifecycle



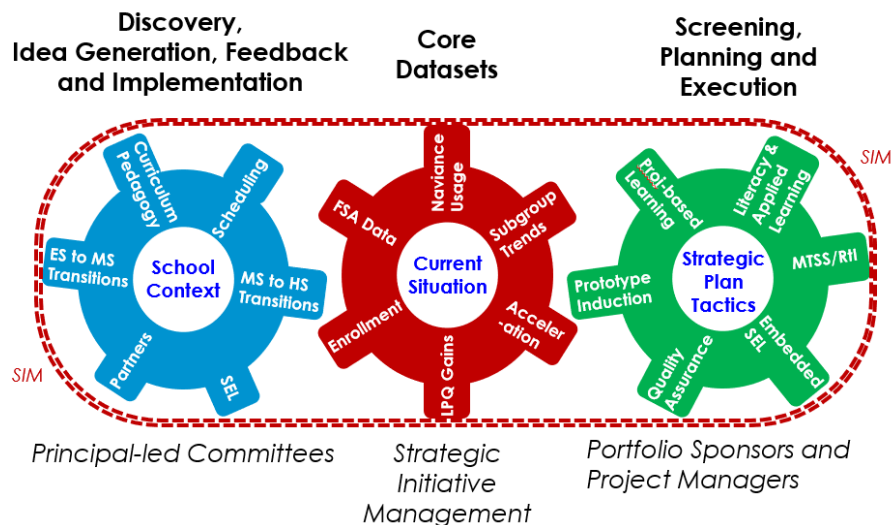
Synchronizing the Work: Current State, Strategic Plan Tactics and Desired State: When defining the desired state for the RMG initiative, what middle grades will be like after we “Reimagine,” District staff first had to understand the current state and how the middle grades environment operates today. Early in the process, starting in the 2016/17 school year, five principal-led committees consisting of principals, Academics department leaders and subject matter experts worked collectively to document the current state (processes, areas for improvement, areas of excellence) in the following focus areas:

1. Elementary to middle transition: vertical alignment of courses and understanding special student populations
2. Middle to high transition: vertical alignment of courses and matrix of course offerings
3. Scheduling: survey of current practices, teacher collaboration (grade level, subject)

4. Curriculum/pedagogy: survey of current practices, integration of data to design and implement rigorous instruction
5. Social and emotional wellbeing: adolescent development for instruction, organization and discipline.
6. Community & external partners: utilizing partnership for targeted needs

These committees produced a starting list of ideas of how to “Reimagine” the middle grades environment. The composition of ideas spanned from transitional to transformative and included innovations/“reimaginings” already happening at a grassroots level at select schools in the District. At this point, the SIM team entered the process with a focus on synchronizing the work. The goal was to align the spectrum of ideas to “Reimagine” with baseline student data and Strategic Plan tactics managed by the Project Managers and Executive Sponsor. By taking an interconnected approach to understanding the “as is” when defining the “to be,” SIM focused on utilizing data to inform the direction. In Figure 35, the image of school context, current situation and strategic plan tactics as interconnected wheels is a purposeful depiction of the important unity between the working teams, the data, the tactics in order to “turn” and SIM acting as the “chain” ensuring that the wheels are connected and synchronized. Through a series of workshops, consultations and principal level meetings, SIM helped the project teams further mature the list of ideas and align them with workstreams, finalize the Theory of Action and populate the Logic Model’s inputs, processes and outputs (deliverables). From this point, the deliverables were ready to be formed into proposals and implementation plans.

Figure 35. Reimagining the Middle Years Visualization

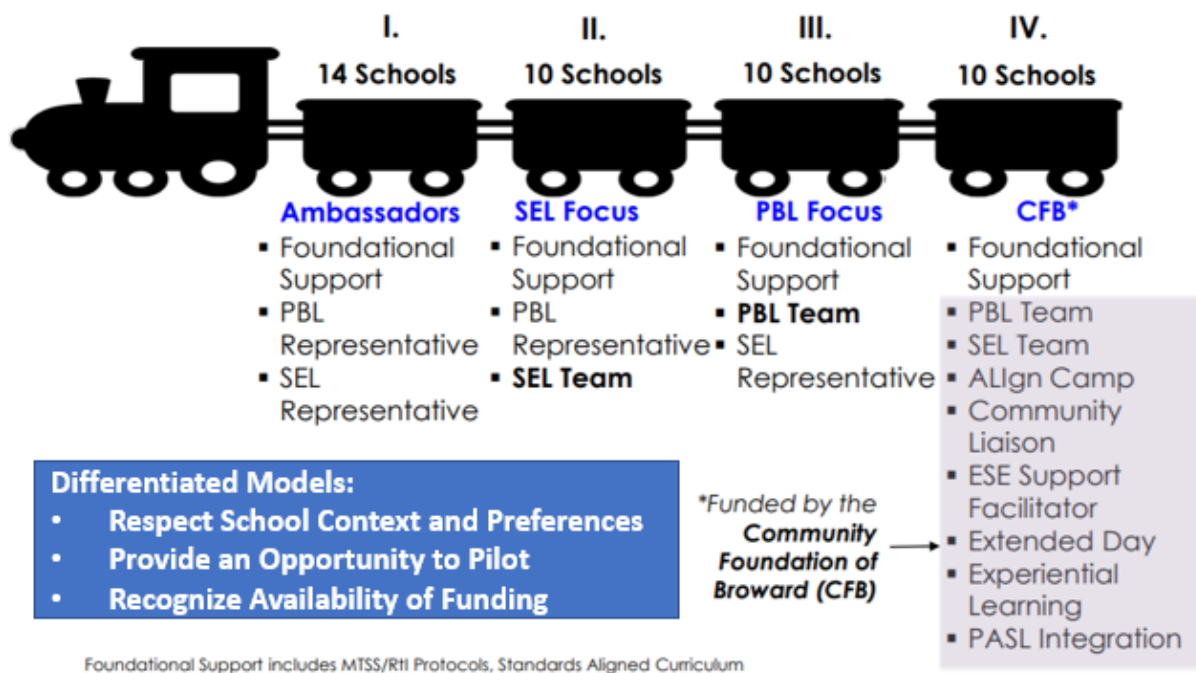


Development of Proposals and Implementation Plans: From the synchronized work facilitated by SIM and executed by the project teams, more than 50 ideas to “Reimagine” middle grades were sculpted into the six workstream proposals and deliverables currently in place. The RMG initiative proposals are a byproduct of intensive engagement with District departments, internal and external stakeholders and community partners. The Quality Assurance project team spearheaded several widespread and impactful stakeholder engagement campaigns comprised of 12,281 middle grades and 5,688 ninth grade student surveys and 1,328 teacher surveys that resulted in multi-session Think Tanks where 364 teachers and 240

students contributed to defining how BCPS should “Reimagine” the middle grades. The project teams engaged the Board through four Board Workshops to craft the finalized proposals.

The implementation plan for the 44 middle grades schools is depicted in Figure 36. The schools are divided into 4 models, ranging from Community Foundation of Broward (CFB) grant-funded schools, Project and Problem-Based Learning (PBL) focused, Social Emotional Learning (SEL) focused and Ambassador schools that will self-initiate both PBL and SEL. The District’s partnership with the CFB provides the opportunity to truly “Reimagine” the 10 CFB schools to a level that exceeds the other implementation models. As illustrated in the shaded box in Figure 36, the CFB schools will have a middle grades experience shaped by Problem- and Project-Based Learning operating within a Socially-Emotionally supportive culture that is staffed by Community Liaisons and ESE Support Facilitators who are targeting student needs. Students at the CFB schools have access to ALiGn Applied Learning camps to further their exposure to new and different elective offerings and will attend experiential learning activities aimed at connecting learning to real world experiences. Foundational support for MTSS/RtI, PBL curriculum and projects, SEL survey tools, professional development, sub-cadre meetings and collaborative visits will be available to every single middle grades school. It is important to note that these implementation models are differentiated but ensure that they respect school context and preferences, provide an opportunity to pilot and recognize the availability of funding.

Figure 36. RMG Implementation Plan



The first components of Year 2 RMG implementation occurred in Summer 2018. The project teams organized a two-week summer institute for professional development geared towards teachers, instructional support staff, guidance, and school leadership, reaching 635 participants who were organized by the Reimagine implementation model for their school. Professional development content covered the gold standard of problem- and project-based learning with partner Buck Institute, Social

Emotional Learning curriculum and culture utilizing Conscious Discipline and Second Step and MTSS/RtI foundations and field guide.

In addition, the Applied Learning workstream hosted 5 ALIgn camps in Summer 2018, reaching over 700 students in 5th to 9th grade. The focus of the ALIgn camps was to provide students exposure to new and different electives and provide a sense of belonging in a peer community centered on an activity that elicits passion and engagement. Students experienced art, music, debate, computer science, STEM and yoga/mindfulness and self-selected one elective for intensive immersion in week 2 of the camp.

Most importantly, many of the transformative “Reimagine” ideas are made possible due to the diligence of the project teams in attaining both a 3-year, \$3.0M grant from the CFB and a \$98,000 grant from Chiefs for Change. Both the summer institute for professional development and ALIgn camps were made possible by securing funding through these partnerships and grants.

School Board Workshop. RMG was brought for Board conversation four times in the 2017/18 school year, on a set cadence that aligned with the phases of the project management lifecycle. Each Board Workshop was designed to build upon the previous session and integrate feedback, initiate course correction and refine the initiative proposals and implementation plans for rollout in 2018/19 school year. Summarized below are the four Board Workshop dates, overall theme for each session and areas of focus for discussion.

- **November 11, 2017: Discovery & Foundations** – review of Strategic Plan tactics, Project teams, Theory of Action, Logic Model and the method for synchronizing the work to understand the current state, achieving the desired state, implementation considerations and gaining Board feedback on the initial spectrum of ideas.
- **December 12, 2017: Preliminary Proposals** – an in-depth discussion on proposals for each workstream, strategy for scaling, methods/modes of professional development, options for tailoring to school context and ensuring appropriate support and quality assurance.
- **January 30, 2018: Finalized Proposals** – finalization of 2018/19 RMG priorities, stakeholder insights, PBL demonstration, PBL/SEL professional development plans, ALIgn camps and RMG Initiative cost estimation.
- **June 19, 2018: Implementation Models and 2018/19 Activities** – overview of the four implementation models, phases for rollout, external partner funding, professional development (summer & ongoing), outlook of activities in the next 90 days and proposed metrics for measuring process/outputs and outcomes.

Each Board Workshop contained invaluable discussion with the Board and Project team members, and wherever possible, this feedback served to guide the finalization of the RMG initiative deliverables. Throughout the Board conversations, there were several guiding principles surfaced: the RMG initiative should be flexible to school context, address the needs of all student sub-groups, be responsive to stakeholder feedback, provide a pool of resources for teachers/administrators and offer intensive and frequent professional development. These guiding principles are points of reference as the Project Managers and Executive Sponsor develop their project plans.

Project Plan Development. Based on outcomes from the Board Workshops, each of the six workstreams will be guided by detailed project plans developed by the Project Managers, Portfolio Manager, and facilitated by the SIM Team. The precursor to developing these detailed plans was defining project deliverables for each workstream. Through workshop sessions with SIM, the RMG Initiative team worked to define deliverables, and map timelines and interdependencies. Immediately following these sessions were 1:1 SIM consultations with each Project Manager and the Executive Sponsor to start formally documenting the Project Plans on SIM's Project Plan tool. While still in progress, the year 1 project plans are focused on these specific strategies:

- **Problem- and Project-Based Learning (PBL)** focuses on delivery of professional development and PBL curriculum developed at the summer institute and measuring the implementation of PBL through school site visits, collaborative walks and sub-cadre meetings.
- **Social Emotional Learning (SEL)** focuses on enhanced social-emotional development and relationships through professional development and deployment of the Conscious Discipline curriculum and informed by SEL survey data collected utilizing the Panorama survey tool.
- **Applied Learning** focuses on the execution of summer Allgn Applied Learning camps, elective feeder patterns and preparing the curriculum and classroom immersion needed for the groundbreaking of Controlled Environment Agriculture (CEA) at Plantation Middle.
- **MTSS/RtI** focuses on deployment professional development and a principal guide highlighting critical components, resource mapping and exemplars of MTSS/RtI in practice.
- **Quality Assurance** focuses on re-aligning structures for sub-cadre and collaborative visits, professional development, implementation of teacher observations and development of “Look Fors” and an RMG Field Guide.

Strategic Consultation

In addition to supporting the RMG project teams in the Planning phase, SIM provided guidance for Year 2 management of the next phase of the lifecycle, Execution, and establishing the cadences for data collection, metric analysis and reporting that will enable any course correction needed in the RMG initiative. Listed below are key themes captured by the SIM team to gauge the implementation progress in Year 2 and determine the metrics monitored:

- Capturing the “dosage” of RMG by school, school context as a driver
- Addressing Board concerns regarding scale, professional development, student sub-groups, access points
- Developing a report-out cadence for internal and external stakeholders
- Measuring student engagement
- Measuring student and adult social emotional health
- Onboarding new Coordinator, Community Liaisons, ESE Specialists (CFB schools)
- Linking/considering transitions from elementary school and for the CCR initiative (ramping up)
- Agility & course correction

Data Analysis & Interpretation

In the beginning Planning stages, SIM provided Data Analysis and Interpretation services to inform the middle school principal work groups' documentation of the current state environment in schools. Specifically, principals requested supporting analyses to understand the loss of students to charter

schools, student mastery and growth in ELA and math, acceleration and learning gains, achievement compared to other Florida schools as well as the impact of Reading for All/Double Block of reading. Baseline data for the RMG initiative, as reflected on the Strategic Plan dashboard, illustrates that for the 2017/18 school year, only 53.4% of 6th-8th graders are proficient in ELA and 56.9% are proficient in Math. These baseline metrics are primary drivers in the development of RMG deliverables. In addition, SIM facilitated sessions with the Project Managers and Executive Sponsor to identify process/output and outcome metrics to measure the progress of the RMG initiative as well as determining methods to collect the data. A summary of all metrics measured is presented in Figure 37 and illustrates the breadth of metrics under consideration, covering academics, social emotional wellness, engagement and professional development.

Figure 37. Summary of RMG Metrics

Process/Output Metrics
Align Camp – Student Enrollment and Attendance
Electives – Offerings, Enrollment, and Attendance
Extra Curricular Activities – Enrollment and Attendance
Instructional Facilitators – Number Hired; Instructional Facilitator to Student Ratio
Professional Development – Instructional Staff Participation and Completion
Project Based Learning – Level of Implementation; Participation Rate
Social Emotional Learning – Level of Implementation; Participation Rate
Outcome Metrics
Academic Growth – Florida Standards Assessment Learning Gains/Growth Index
Academic Performance – Core Course Grades (ELA, Math, Science, Social Studies)
Attendance – Absenteeism; Unexcused Absenteeism
Behavior – Incidents and Discipline
Social Emotional Learning – Performance and Gains on Standardized Instrument
Standards Attainment – Florida Standards Assessment Scores/Mastery Index
Transitions 5th to 6th Grade – Course Grades and FSA Learning Gains/Growth

College and Career Readiness

BCPS wants students to thrive while they are in school and after they graduate. That requires the skills, dispositions, and abilities needed to be successful at school, at work, in life, and as a citizen. College and Career Readiness (CCR) is the District’s high-priority initiative directed at the high school level. The CCR initiative encompasses six components:

- 1) Student transitions, to examine how students can be better prepared for high school, as well as how they can move on successfully to college or a career;
- 2) The curriculum continuum, to personalize student learning with individual academic plans mapped to career exploration;
- 3) Social emotional learning, to develop interpersonal, employability, stress management, conflict resolution, and resiliency skills;
- 4) Innovative prototypes, to introduce new programs and models to BCPS’s portfolio;

- 5) Strengthening the academic core, to prepare students for their chosen post-secondary pathway; and
- 6) Partnerships and community involvement, to leverage support provided by families, businesses, non-profit organizations, and faith-based entities.

High school principals met regularly over the 2017/18 school year to develop a collective perspective on how the above components could be integrated into the Broward context and introduced at their schools. Those perspectives built up from an honest assessment of where the District stands today across all components (current state) to a view on how it can improve (desired future state).

The February 2018 tragedy at Marjory Stoneman Douglas High School prompted a stark reassessment of the High School learning tactics proffered in the 2016 – 2019 Strategic Plan. That reassessment preserves the District’s intent behind college and career-preparedness, but also places additional emphasis on student physical safety and emotional well-being, which are essential for a healthy learning environment. Thus, moving forward, the CCR initiative will champion tactics that promote student happiness, agency, critical consciousness, and independent learning. Table 13 outlines indicators that are associated with a healthy learning environment.

Table 13
Indicators of a Healthy Learning Environment

Attributes	Indicators
Happiness	<ul style="list-style-type: none"> • Welcoming and safe school • Routine student recognitions and appreciation • Time and space provided for the development of staff-student relationships • Programmatic options for students to connect to the school community
Agency	<ul style="list-style-type: none"> • Presence of student choice • Identification of personal goals and learning plans • Student-led conferences • Self-monitoring and regulation of academic performance • Student advocacy
Critical Consciousness	<ul style="list-style-type: none"> • Curriculum and activities connected to lived experiences and society • Student voice: co-developed classroom norms, routines, and rituals
Independent Learning	<ul style="list-style-type: none"> • Opportunities for student problem-solving, teamwork, meta-cognition, etc. • Leadership programs • Opportunities for real-life applications of knowledge

Principal voice will shape the finalization of the District’s Theory of Action behind its CCR initiative, while broader stakeholder input (particularly from students and teachers) will inform how it is implemented. Outcomes that will be monitored to gauge the success of the initiative will include local, state, national, and international assessment results, graduation rates, industry certifications, college enrollment, college financial aid applications and awards, behavior, attendance, and social-emotional measures.

Strategic Consultation

The 2017/18 launch of the CCR initiative at BCPS concentrated on principal engagement. SIM provided consultative support early in the school year to acquaint principals with the SIM framework and toolsets— i.e., the Theory of Action, Logic Model, and Project Plans—that will be applied to the CCR initiative in the first half of the 2018/19 school year. By knowing in advance how their input will be utilized, principals would be better positioned to transition their ideas into the project work needed to realize them.

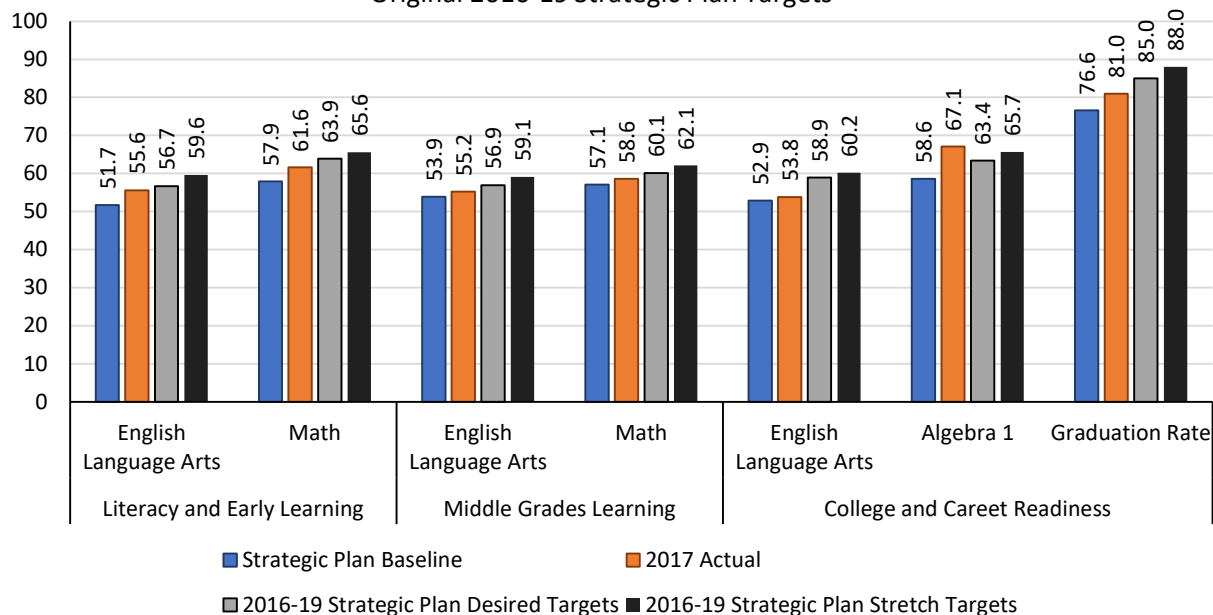
Data Analysis & Interpretation

SIM also provided Data Analysis and Interpretation services to inform the discussions that high school principals had related to the CCR initiative. Specifically, principals requested supporting analyses to understand the extent to which students entering ninth grade are ready for high school. For that context, high school readiness is defined as students obtaining a Level 3 or higher in ELA and Mathematics on the 8th grade FSA. The data reveal that only 49% of students entering high school met that criteria in 2018, a value that has changed little since 2016.

Strategic Target Recalibration

At the August 15, 2017 School Board Workshop, the Chief Academic Officer and Chief Strategy & Operations Officer provided a presentation and discussion of the District Strategic Plan – Recalibrated: 2016/17 Review and 2017/18 Update. An essential component of the discussion concerned progress the District had made through the 2016/17 school year with regard to meeting the Strategic Plan High-Quality Instruction (HQI) Academic Targets. Figure 38 shows the original 2016-19 Strategic Plan targets along with Strategic Plan Baseline data (2014/15) and the 2017 actual data.

Figure 38. Strategic Plan Baseline, 2017 Actual & Original 2016-19 Strategic Plan Targets



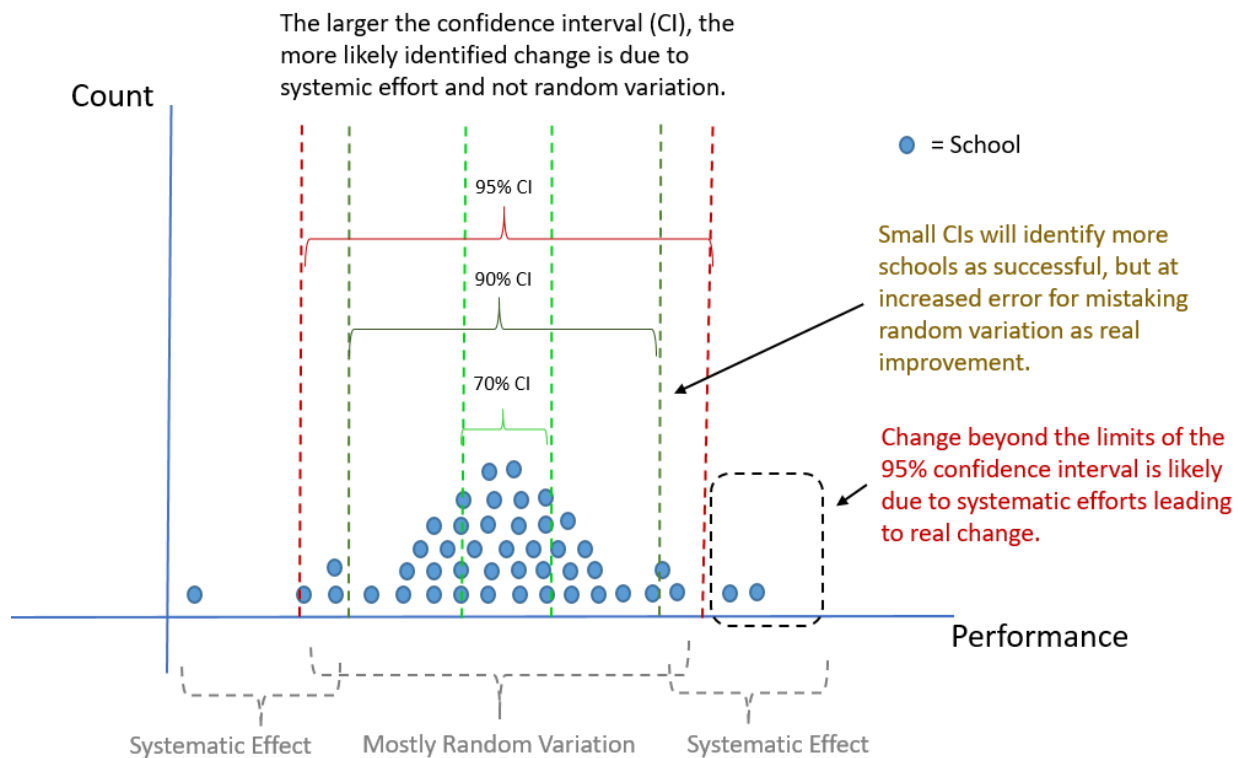
Due to the progress the District had made towards meeting, and in some cases exceeding, the established targets, the School Board requested:

Staff to revisit the strategic goals, particularly the stretch goals, to determine if they now need to be increased because of Year 1 outcomes (W-081517-05).

In response, SIM staff took on the challenge to recalibrate the Strategic Plan targets. This process included consultation with principals, employment of statistical methods, application of non-statistical forecasting, and multiple School Board Workshops.

On September 29, 2017, a group of seven principals representing elementary, middle, high, and center schools met with the SIM team to review options and make recommendations. All participating principals had previously been part of the principals’ work group that established the original Strategic Plan targets on May 19, 2016. In preparation for this meeting, the SIM team used a statistical model to estimate potential targets under three confidence intervals—70%, 90%, and 95%. Figure 39 provides a schematic of the relationships between confidence interval width and detection of systematic impact beyond random variation.

Figure 39. Theoretical Basis of Statistical Models for Target Setting



Application of the statistical model yielded the values in Table 14, which was presented to the principals.

Table 14
Potential Targets Indicated by the Statistical Model at the 70%, 90%, and 95% Confidence Intervals

	2017 Actual	Original Stretch Targets	70% CI			90% CI			95% CI		
			Computed Target	Difference From		Computed Target	Difference From		Computed Target	Difference From	
				Original Stretch Targets	2017 Actual		Original Stretch Targets	2017 Actual		Original Stretch Targets	2017 Actual
Literacy and Early Learning											
English Language Arts	55.6	59.6	60.8	1.2	5.2	63.8	4.2	8.2	65.3	5.7	9.7
Math	61.6	65.6	66.7	1.1	5.1	69.5	3.9	7.9	70.9	5.3	9.3
Middle Grades Learning											
English Language Arts	55.2	59.1	58.6	-0.5	3.4	60.6	1.5	5.4	61.6	2.5	6.4
Math	58.6	62.1	61.9	-0.2	3.3	63.8	1.7	5.2	64.8	2.7	6.2
College and Career Readiness											
English Language Arts	53.8	60.2	57.1	-3.1	3.3	59.0	-1.2	5.2	60.0	-0.2	6.2
Algebra 1 Combined	67.1	65.7	72.0	6.3	4.9	74.6	8.9	7.5	75.9	10.2	8.8
Graduation Rate	TBD	88.0		TBD			TBD			TBD	

The principals considered three options:

1. Maintain the original Strategic Plan 2019 stretch targets
2. Adopt proposed recalibrated Strategic Plan targets for all Strategic Plan Objectives
3. Adopt proposed recalibrated Strategic Plan Targets for select Strategic Plan Objectives

The principals held a discussion independent of the SIM team to reach consensus on their recommendation. Their consensus was to update all targets using the statistical model with the 90% confidence interval. The principals reasoned that methods and standards should be consistent for all HQI goals. They asserted that principals regularly review outcomes and naturally increase their targets when they approach or reach their goals and that remaining with lower targets once reached, such as with Algebra, may lead to false sense of accomplishment. They felt that the 90% confidence interval criterion is high, but attainable. The principals warned, however, that with increased targets, it is essential to ensure necessary support and resources for at-risk schools and students.

Recommendations from the principals’ focus group and the recommended recalibrated targets were presented by the Chief Academic Officer and the Chief Strategy & Operations Officer to the School Board during a workshop on November 14, 2017. School Board Members expressed dissatisfaction that a single target was identified for each objected as opposed to maintaining a “desired” and a “stretch” target as was published in the original 2016-19 Strategic Plan. (The original “desired” targets were proposed by the May 19, 2016 principals’ group, the original “stretch” targets were determined using the same statistical approach to produce the recalibrated targets.) Staff were directed to produce recalibrated “desired” targets without re-engaging the principals and bring back to a School Board Workshop.

To simulate “desired” targets, SIM applied a trend forecast model which assumes that there is no systematic effort to change the system and the three-year historical trajectory will continue over the subsequent 2 years. The trend forecast therefore provides a lower bound for a desired target. The more aggressive statistical model provides the stretch target. A third possibility was prepared as the midpoint between the trend and statistical models. The School Board opted to adopt the trend forecast as the “desired” target and the statistical model as the “stretch” target. In a departure from the original Strategic Plan targets, which encompassed all District Traditional and Charter schools, the recalibrated targets were

restricted to the District’s Traditional⁷ schools only. Table 15 displays the original and recalibrated targets for English Language Arts (ELA), Math, Algebra 1, and Graduation Rates.

Table 15
Original and Recalibrated Strategic Plan Targets

Outcome	Original Strategic Plan*				Recalibrated**	
	State Average	BCPS Baseline	2019 Desired Target	2019 Stretch Target	2019 Desired Target	2019 Stretch Target
Literacy and Early Learning						
ELA	53.0	51.7	56.7	59.6	60.2	62.1
Math	57.0	57.9	63.9	65.6	66.7	68.6
Middle Grades Learning						
ELA	52.0	53.9	56.9	59.1	55.6	57.5
Math	55.0	57.1	60.1	62.1	60.0	61.5
College and Career Readiness						
ELA	52.0	52.9	58.9	60.2	56.4	58.2
Algebra 1	56.0	58.6	63.4	65.7	73.5	74.2
Graduation Rate	77.8	76.6	85.0	88.0	89.0	89.1

* Includes all schools (traditional and charter schools) combining performance across grade levels as the percentage of students scoring Level 3 and above. Algebra 1 accounts for all students testing in this subject at all school/grade levels.

** Includes traditional schools only.

Table 16 below shows the Strategic Plan data for all schools as originally formulated, re-calibrated actual data based on traditional schools only, and the recalibrated targets, also based on traditional schools only. Figure 40 graphically displays the recalibrated data. In the figure, the current 2018 actual data are indicated as orange bars. The largest year-over-year gain was found among the elementary grades ELA data, where the composite Grades 3 to 5 satisfactory performance rate increased by 1.9 percentage points from 54.1% in 2017 to 56.0% in 2018. All other movement was 1.1 percentage points or less, and in the case of Algebra 1, a decrease of 5.1 percentage points.

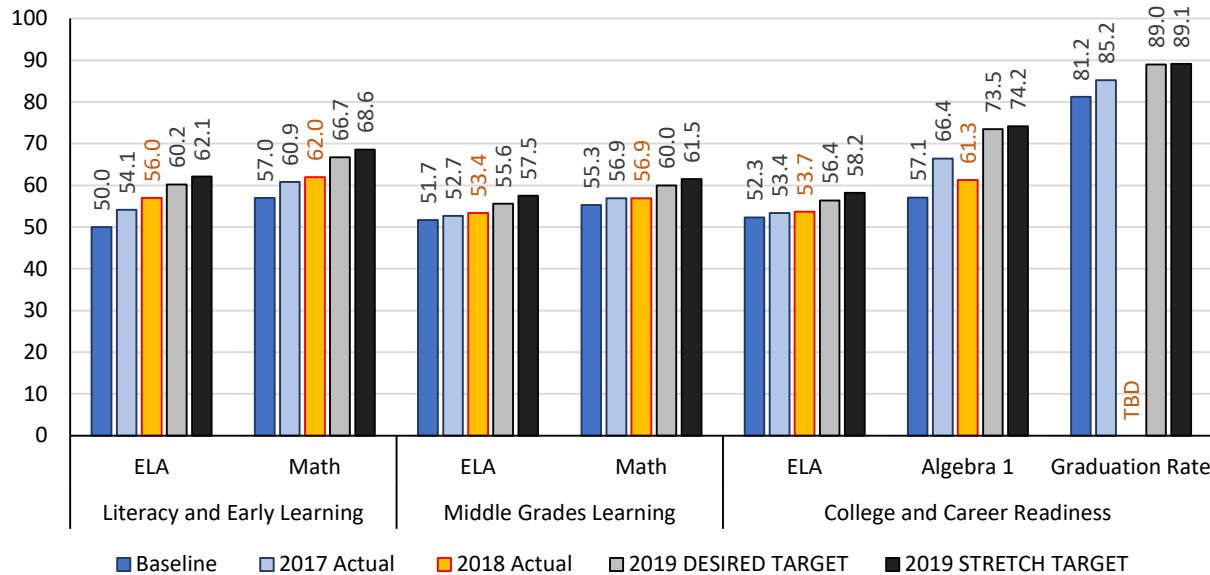
Table 16
Strategic Plan Metrics and Targets by Objective

Outcome	All Schools			Traditional Only			Recalibrated Targets	
	Baseline	2017 Actual	2018 Actual	Baseline	2017 Actual	2018 Actual	2019 DESIRED	2019 STRETCH
Literacy and Early Learning								
ELA	51.7	55.6	57.3	50.0	54.1	56.0	60.2	62.1
Math	57.9	61.6	62.7	57.0	60.9	62.0	66.7	68.6
Middle Grades Learning								
ELA	53.9	55.2	55.9	51.7	52.7	53.4	55.6	57.5
Math	57.1	58.6	59.3	55.3	56.9	56.9	60.0	61.5
College and Career Readiness								
ELA	52.9	53.8	54.5	52.3	53.4	53.7	56.4	58.2
Algebra 1	58.6	67.1	62.8	57.1	66.4	61.3	73.5	74.2
Graduation	76.6	81.0	NA	81.2	85.2	NA	89.0	89.1

Source: State Exams Dashboard.

⁷ Traditional schools are limited to non-charter schools.

Figure 40. Strategic Plan Baseline, 2017 & 2018 Actual Performance, & Recalibrated Targets, Traditional Schools Only



It should be noted, however, that Marjory Stoneman Douglas High School (MSDHS) did not contribute to the test scores in 2018 due to the events that occurred in February before the 2018 testing window. To determine the potential impact of excluding MSDHS from the 2018 data, the baseline and 2017 actual performance data were recomputed without MSDHS. The results are shown in Table 17. Excluding MSDHS decreases District performance in ELA by approximately 1 percentage point, has limited impact on Algebra 1 performance, and decreases the graduation rate by approximately one-half percentage point. When the re-computed 2017 data are compared with 2018, the District excluding MSDHS, realized an increase of 1.3 percentage points in ELA from 52.4 in 2017 to 53.7 in 2018 and a decrease in Algebra 1 performance by 5 percentage points from 66.3 in 2017 to 61.3 in 2018.

Table 17
Impact of Excluding MSDHS from District College and Career Readiness Metrics

	MSDHS		Difference
	Included	Excluded	
ELA			
Baseline	52.3	51.4	-0.9
2017	53.4	52.4	-1.0
Algebra 1			
Baseline	57.1	57.4	0.3
2017	66.4	66.3	-0.1
Graduation Rate			
Baseline	81.2	80.7	-0.5
2017	85.2	84.6	-0.6

D. Deliverables – Performance Management Reviews

Through a combination of strategic consultations and workshops, the Performance Management team turned a spotlight on the operations sector of BCPS and partnered with several District departments to discuss their current core business focus, value-added services and challenges they face in providing these services. Findings from these workshops culminated in Performance Management (PM) Reviews.

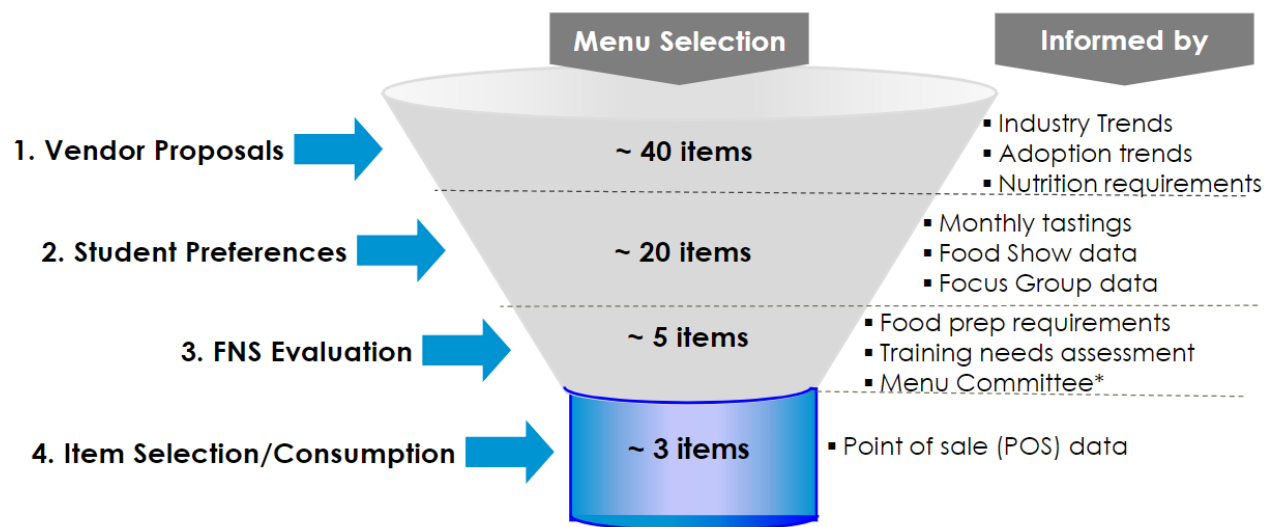
Food & Nutrition Services (FNS)

A PM Review for Food and Nutrition Services (FNS) was held on April 13, 2018 to understand how their focus on food quality and customer service supported by staff development furthers their mission to provide nourishing meals that support student achievement and lifelong healthy lifestyles.

Findings

Delivering food quality to the students of BCPS is a balance between meeting governmental standards/requirements and offering appealing meal options to a large, diverse customer population. The FNS team utilizes a Menu Selection process to address this challenge. By partnering with vendors at the forefront, the menu committee utilizes industry expertise to bring menu item options that align with customer trends and meet nutritional requirements. Students weigh-in via a multitude of venues that include monthly tastings, food shows and focus groups. The highest-ranked items by students are the starting point for evaluation. Items are filtered further based on food preparation requirements, training needs and evaluation by the FNS team. The Menu Selection process is initiated 4 times per year. In the end, the items that make it to the menu are those that the end consumer, students, actually purchase. For every 40 items that enter the Menu Selection process, approximately 1-3 items (8% of starting count) make it to the menu. Figure 41 illustrates the 4-Step Menu Selection Process.

Figure 41. FNS 4-Step Menu Selection Process



Across the diversity of BCPS school sites, cafeteria staffing patterns and service options are tailored to meet customer service expectations and each school-site’s specific requirements. There are multiple food service options that include regular meal service, food courts, patio dining, “grab-n-go”, remote kiosks, digital menu boards, vending and concessions to try and reach the customer in terms of both volume and convenience.

Tenure in the FNS organization focuses on growth through professional development and includes defined career pathways with opportunities from internships to food service management. The professional development offered to FNS employees is a well-rounded portfolio and extends beyond orientation, sanitation and foundations (required training) to include quantity cooking, nutrition, meal planning as well as refreshers on soft-skills such as leadership and technology. During the 2017/18 school year, the FNS team added a new role of an HR Specialist. This key position will target reasons for turnover, produce standardized reporting, analyze job descriptions and expand the methods for recruitment such as staff sourcing and college and career fairs.

KPIs

The “fruits” of the FNS team’s labor are clearly illustrated by great improvements in department KPIs. Meal participation district-wide has been steadily increasing since 2014/15, with both lunch and breakfast participation now at seven-year highs (64% and 30%, respectively). Growth in this area is bittersweet as the multi-phased implementation of nutritional standards and requirements from the Healthy Hunger Free Act (whole grains, fruits/vegetables, low saturated fat) impacted participation and posed challenges for finding meal options that are nutritionally sound and appetizing. Cost trends have been well managed and are relatively stable over time. Productivity, illustrated in Meals per Labor Hour, has stabilized and with the current model of site-based production and minimum staffing levels, will most likely hold this trend. During the 2017/18 school year, the FNS department Total Cost as a Percent of Revenue was partially impacted by closures during Hurricane Irma and the subsequent funding for staff cleanup and free meals at school sites.

Next Steps

Potential areas for future improvement within FNS include (a) expanding the cadence of touchpoints with school leadership to share menu item performance and (b) strategizing for better alignment of monthly food tastings with school curriculum. Additionally, the FNS team emphasized the importance of communication regarding school schedule changes as they impact food service timing and partnership with school leadership in improving adoption of expanded service options.

Procurement & Warehousing Services (PWS)

A PM Review for Procurement and Warehouse Services (PWS) was held on May 18, 2018 to understand how their current focus on culture change, compliance and technology furthers their mission to provide policy guidance that brings ongoing, effective and responsive procurement and warehousing solutions to obtain compliant, high quality goods and services at reasonable costs.

Findings

Within the past few years, there has been turnover (both retirement and resignations) in many areas of PWS. The PWS leadership team acknowledges a need to focus on the department’s work environment, team-building, recognition, employee

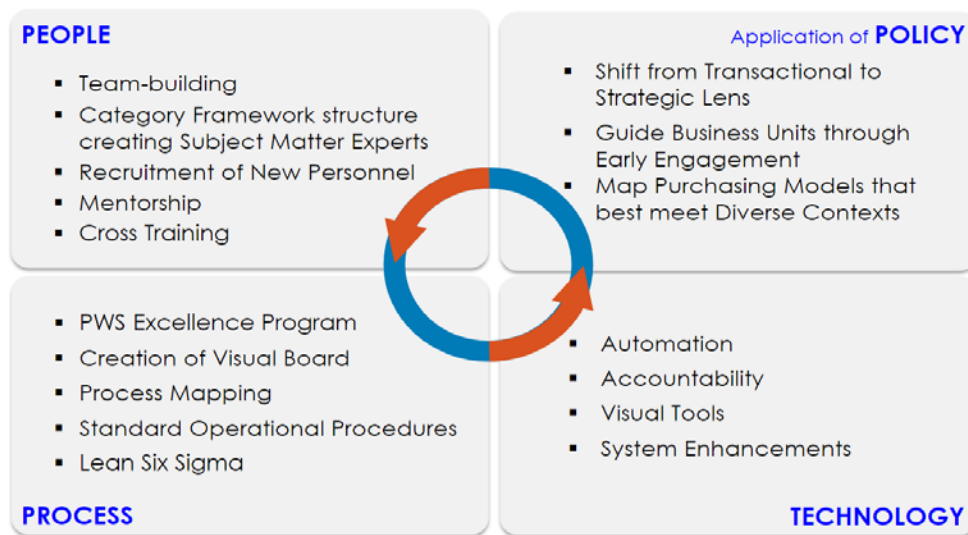


Procurement & Warehousing Services staff accompanied by SIM staff during May 18, 2018 PM Review.

empowerment and establishment of clear operating principles/processes to continue delivering improvements to its customers.

The PWS team has taken a holistic approach to improving both their business practices and department culture through a change management plan focused on people, policy, process and technology (see Figure 42). The PWS team established a PWS Excellence Program that emphasizes mentoring/cross-training, process mapping, KPI visualization/accountability paired with technology enhancements. The next area of focus will be the warehouse, its organizational setup, opportunities to optimize operations, improving accuracy and documentation of Standard Operating Procedures (SOPs).

Figure 42. PWS Change Management Plan



In response to a recent change to Policy 3320 Purchasing Policies and creation of Policy 3330 Supplier Diversity Outreach, the PWS team has put structures, programs and systems in place to manage increased volume and ensure enforcement of policy. Board Item volume handled by the PWS team for Policy 3320 has increased from 150 to 396 items in the past 2 years and includes both EE items (spending authority) and JJ items (SMART bond). Policy 3330 was created to increase Small, Minority, Women Business Enterprises (SMWBE) outreach and participation through a goal setting committee, diversity remedies through Affirmative Procurement Initiatives and creation of a Central Bidders Registration. The Central Bidders Registration has been a year in the making and will enable the PWS team to develop efficient and timely reporting of registered bidders and provide an enhanced process for companies participating in the bidding process. Currently, the number of SMWBE certified companies has increased over 11% in the past year and should continue to improve with the department’s technology enhancements and focused outreach.

While managing significant increases in Board Items and changes in personnel, the PWS team pursued technology enhancements to aid in accountability, automation and visualization. The SAP Ariba upgrade delivered an improved supplier onboarding process, a central bidder registration and vendor sourcing platform. Internally, the team has automated the Financial Analysis Worksheet that accompanies Board items and reduced publication timeline from 5 days to 1 hour. Several new activity trackers (Contracts, SMART, Savings) provide running accounts of department activities and are often highlighted on a large

department visualization wall that showcases KPIs, departmental goals, due dates and employee recognition.

KPIs

KPI trends prior to 2016/17 are not possible as there are inconsistencies in reporting, inability to collect data based on older toolsets and a change in leadership. Through the creation of automated reporting, KPI visualization walls and metric trackers, the PWS team has developed a methodology for producing consistent and supported datasets going forward. Early wins in KPI improvement include 2-year reductions in Administrative lead times (Formal Proposals from 153 to 98 days and Invitations for Bid from 119 to 64 days) and highlight the department's focus on process and toolsets to improve customer service. There are 7 key levers influencing the Procurement business with a mixture of internal & external control. State laws/regulations paired with District policy act as fundamental governing principles for Procurement best practices. The department's focus on systems, technology and level of automation will impact a large majority of PWS KPIs.

Next Steps

Potential areas for future improvement within PWS include rollout of formalized Service Level Agreements (SLAs) and established training opportunities on PWS processes for District and school leadership. Additionally, the PWS team will continue to communicate progress towards implementation of SAP Ariba Phase 2 "Procure to Order" rollout and new protocols/process for handling of B-Stock inventory.

Student Transportation & Fleet Services (STFS)

A PM Review for Student Transportation and Fleet Services (STFS) was held on May 18, 2018 to understand how their focus on both customer service and vehicle reliability supported by technology/staffing transitions further their mission to provide safe and efficient transportation to eligible public-school students in compliance with federal, state and local guidelines.

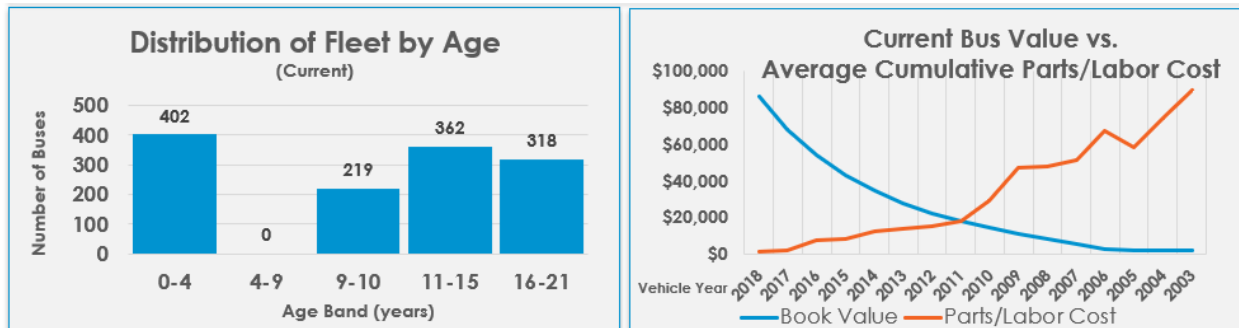
Findings

STFS main focus is providing customer service. As the 6th largest school district in the nation, BCPS presents a large and complex transportation footprint. In any given day, STFS will transport 66,173 students between 43,909 stops and field numerous questions and communications from parents, community and staff. The STFS customer service approach offers an intranet site via PTWeb Portal, a decentralized customer service model provided through school-based liaisons that focuses on continuity of driver and vehicle. From a parent/guardian's point of view, students see a familiar face as the driver arrives and transportation questions can be answered at the student's school, or if needed, routed quickly through the call center for further assistance. Transportation-related customer service complaints fell by 35% last year.

Ensuring vehicle reliability is a key priority when maintaining a complex transportation system such as BCPS's. The District's fleet of 1,301 buses travels 16,000,000 miles annually, with upkeep handled by a team of 42 mechanics who are tasked with a 30:1 bus to mechanic ratio that far exceeds surrounding Florida districts and national large district averages. Further complicating efforts to keep the fleet maintained and functional is the large disparity in age of the fleet, with nearly 70% of the fleet nine years or older and 24% of the fleet 16-21 years old. During the financial recession in 2008-2011, the District ceased purchasing new buses, leading to the current disparity between very old buses and those less than

4 years old. As Figure 43 shows, the tipping point between current bus value versus cumulative cost to maintain suggests that at 9-10 years old, the cost to maintain is prohibitive versus the value of the asset.

Figure 43. STFS Fleet Cost Analysis



The STFS team is an experienced and long-tenured team, with most of the leadership having greater than 20+ years with BCPS. Within the 13 leadership roles, 6 team members have announced or will soon be announcing their retirement. Consequently, the STFS team must initiate succession planning to develop the management pipeline and ensure institutional knowledge transfer. STFS has launched the process to recruit for key positions, update job descriptions and has developed a defined career path from entry level to Director role. Partnering with key teams, such as HR, is pivotal to expedite the process.

In terms of a technology footprint, the STFS team has worked diligently to improve core toolsets and move away from outdated platforms. Going live in June 2018, an upgrade from the dated Compass inventory management system to Maximo will bring many data efficiencies, streamlined processes and reporting capabilities. Other recent technology upgrades include the PTWeb Intranet Portal for parents/schools and EJ-Ward Fuel Management system. The STFS team is focused on innovation as they investigate new technologies in pupil transportation such as push notifications, fuel efficiency and idle time, safety analytics of drivers and fleet management, to name a few.

KPIs

STFS KPI trends in Cost per Bus, Daily Buses as a Percent to Total and Average Age of Fleet are interconnected and dependent on the pipeline of new buses entering the system. As buses continue to age, the cost to maintain rises and the proportion of buses used on a daily basis declines with more held as spares in case of breakdown. Cost per Bus trends are also impacted by wage increases for driver retention. BCPS experienced its highest Daily Buses as a Percent to Total (84%) in 2016/17, coinciding with the lowest average age of fleet (8.9 years). Despite operating an aging fleet, the production out of the active fleet is maximized as Daily Runs per Route (5.4) is stable and frequently in Best Quartile rankings among large national districts.

Next Steps

Broward’s aged bus fleet and cost to maintain poses a dilemma between hiring more mechanics to ease workload and perform expensive repairs or committing to a consistent bus purchasing strategy. Based on discussion during the PM Review, the key takeaway for STFS team is to partner in the development of a sustainable vehicle replacement plan. Additionally, other potential areas for future improvement include updating job descriptions and exploration of technology solutions for greater efficiencies and customer service.

Physical Plant Operations (PPO)

A PM Review for Physical Plant Operations (PPO) was held on June 25, 2018 as a Board follow-up request to examine how PPO’s current financial context, efficacy and focus on continuous improvement are reflected in their budget and expenditures as well as furthering their mission to optimize the physical learning environment to maximize student achievement was also discussed.



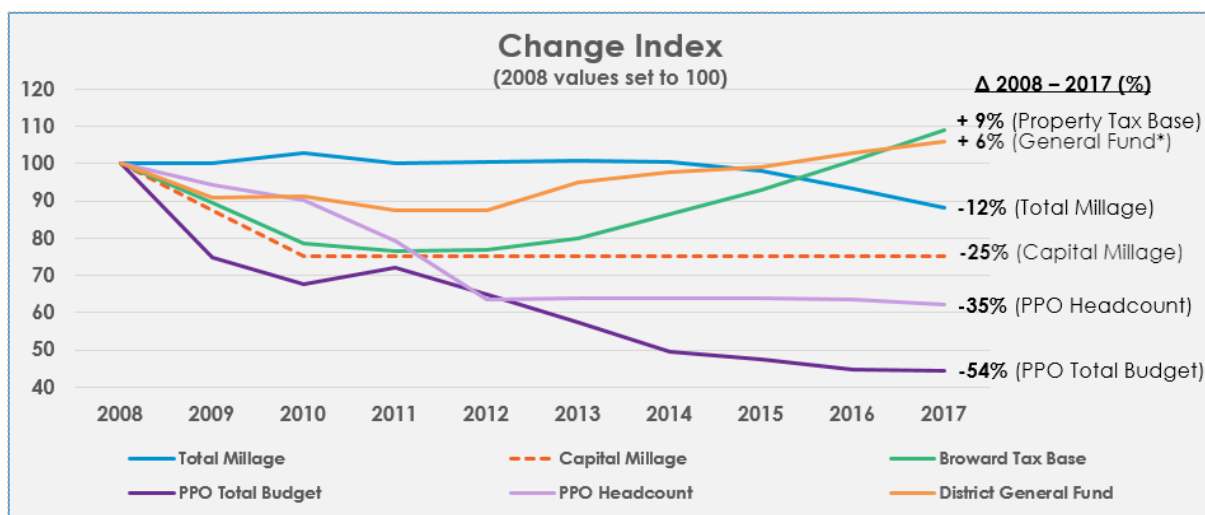
Physical Plant Operations staff during June 25, 2018 PM Review.

Findings

Financial pressure from the 2008 recession combined with cumulative capital millage loss put an intense amount of pressure on the District’s financials and forced drastic cuts to department budgets, headcount and investments. Millage rate cuts starting in 2008-09 and extended to present, account for a \$2.1 billion loss to the District’s capital millage and as the main recipient of capital-related work, the PPO department is severely impacted.

As seen in Figure 44, a comparison of millage, property tax base, District general fund levels and PPO’s budget/headcount over time, PPO has not recovered from the 2008 financial crisis. The general fund balance is +6% higher than pre-recession driven by an increasing property tax base, however the PPO budget and headcount are down (-54% and -35%, respectively), with no incremental changes in the past 5 years. The industry best practice budget guidance recommends a range of 1.5%-4.0% of Current Replacement Value, with the low-end allowing for preventive maintenance if structures are newer, and upper-end allowing for preventive plus replacement services for older infrastructures. When extending this calculation for BCPS, the best practice budget range would be \$100M - \$250M annually. Currently, the PPO annual budget is \$72M. Since 2014, the gap between PPO’s budget and the best practice recommended range is approximately \$175M annually.

Figure 44. PPO Funding Analysis



PPO is under constant pressure from many internal and external performance factors that include a “Run to Fail” business model, macroeconomic conditions, building/fire codes, increasing age of buildings, support of SMART bond and pockets of the student population expanding/contracting. While crucial, SMART funding only covers a portion of the District’s need. Further complicating the ability to maintain BCPS’s infrastructure has been the drastic cuts in PPO staffing, from 698 trades positions in 2008 to 461 in 2017/18, with District square footage holding steady at 37,000,000 square feet. Recession reductions to headcount based on collective bargaining agreements affected younger workers and those with shorter District tenures, whereas the remaining workers are at generally higher wage rates and closer to retirement than their former coworkers. On average, there are 30 to 35 retirements a year and with a hiring timeline of 3 to 6 months in the competitive construction market, the PPO team is essentially 8% vacant at any time. Fewer people tasked with maintaining an aging building footprint that has not changed in size has led to a significant increase in deferred facility needs, which is currently calculated at \$3.0 billion even after considering SMART upgrades.

Based on years of under-funding the department, there is a large queue of deferred work. The composition of work orders within PPO further supports this reality as emergency maintenance constitute 24% of the 70,000 total work orders per year and preventive maintenance at just 11%. Ideally, preventive maintenance should make up at least 20% of work orders. The common question may be, why such a focus on preventive maintenance? Preventive maintenance is an investment that extends the life of an asset and results in lower repair costs over time. Work orders in “emergency” status are more expensive, happen at inopportune times, divert resources away from scheduled work and cause systemic disruption. In an attempt to manage this uncertainty and maintain quality control, PPO uses level of service delivery targets for work order prioritization, monitors downtime and travel time and tracks productivity.

The PPO department has launched several key initiatives focused on improving the department’s performance levers and ensuring continuous improvement. The development/refresh of Standard Operating Procedures and hiring of a dedicated Finance Manager are working in tandem to implement better financial, process and reporting controls. A new work order management system, Maximo CMMS launches in June 2018 and will bring numerous core benefits in asset management, scheduling, resource planning, analytics and field service aimed at shortening the steps for work order completion. The department is in the process of reviewing and updating job descriptions to align with current industry conditions and hopefully expedite candidate attraction and selection.

KPIs

Taking a deeper dive and looking at cost-related KPIs over time, the lack of funding for PPO has thrown the system out of balance. Maintenance and Operations Cost per Student at \$717/student is improved to prior years but far below the Council of the Great City Schools (CGCS) median of \$982. Maintenance and Operations Cost Ratio to District Budget of 6.5% is also below CGCS median of 8.0%. Coupled with cost ratios well below median levels at other large districts, the work order completion time of 35 days is significantly more than CGCS median of 11 days and is driven upwards by the quantity and complexity of work needed in Broward. When reviewing the levers influencing PPO’s performance, 9 of 14 levers are outside of PPO’s direct control such as the customer’s level of service expectations, deferred maintenance backlog, funding and labor supply. Solutions for better performance on KPIs must consider budget, process and scope of work.

Next Steps

Constrained funding to the PPO department inhibits the District's ability to migrate away from reactionary maintenance toward preventive maintenance and extends the timeline and execution of key repair work. There is a widespread belief that, under declining public education funding, cuts should be made as far away from instruction as possible. However, as physical environments deteriorate, student achievement will eventually be affected. Key takeaways for both PPO and District department leaders from the PM Review were to determine how BCPS can ensure a sustainable PPO model going forward and require further exploration into restoration of local millage, evaluation of alternative service delivery models, development of a revised process for hiring/filling vacancies and an understanding of any efficiencies to be gained with the transition to Maximo.

E. Deliverables – Special Request Projects

SIM is approached from time to time to bring its unique combination of expertise to assist in special request projects outside of the strategic initiatives or performance management projects. During the 2017/18 school year, SIM was requested to assist with the creation of a School Board Workshop for the



Dale Schmidt, Director of Performance Management, presenting at the Continuous Improvement Conference 2018 at Broward College on July 30, 2018.

Bilingual/ESOL department, a study of the process and value of Ed Talk for the Public Information Office, data tracking and analysis support for the Community Foundation of Broward’s School is Cool program for the Academics Office, and an analysis of reports produced by external researchers approved through the District’s IRB and Research Review process. Each of these special request projects is discussed in the following sections.

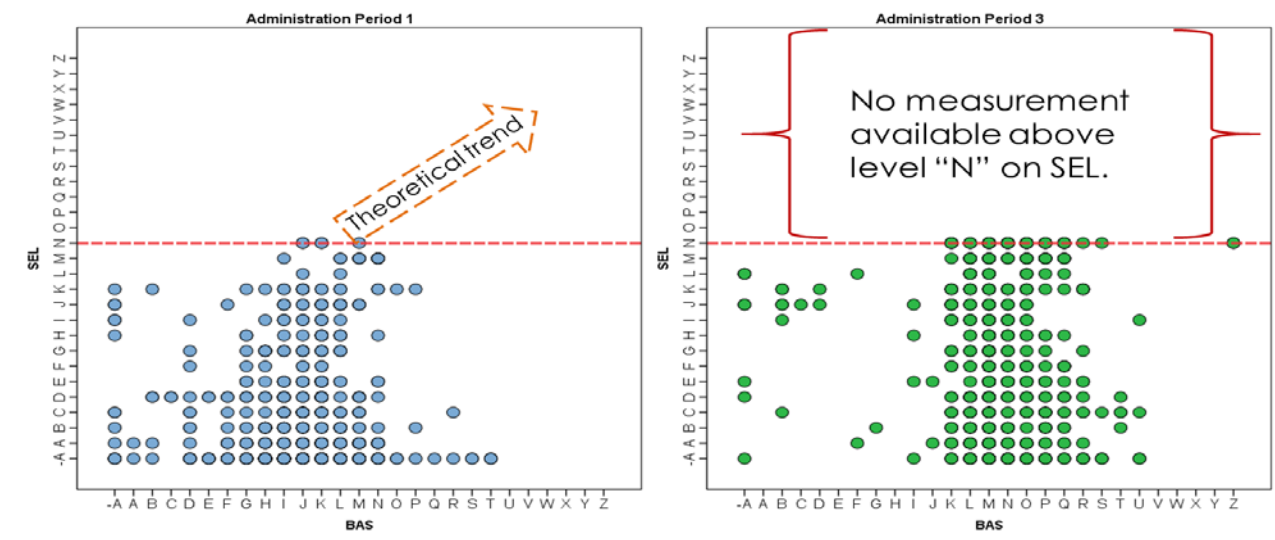
ESOL

In October 2017, the Director of Bilingual/ESOL requested assistance from SIM to develop a School Board Workshop session as requested by the Chief Academic Officer. Specifically, the initial request for consultation entailed SIM assistance for the organization of a massive quantity of information into a coherent story line and for assistance in reviewing data. Through a series of consultative meetings in November and December 2017, data were prepared, reviewed, summarized, and incorporated into the February 13, 2018 School Board Workshop. Highlights of specific work is described below.

Language Acquisition

The Sistema de evaluación de la lectura (SEL) is the Spanish language counterpart to the Benchmark Assessment System (BAS) used to monitor language. Both assessments are used with students in the Dual Language (Spanish & English) program at the elementary grades level. Students participating in the Dual Language program should progress toward biliteracy and show corresponding progress on both assessments. SIM created the scatter plots in Figure 45 which show the relationships between students’ scores in the BAS and SEL at Administration Period 1 and Administration Period 3 (AP1, AP3, respectively). Comparing AP1 to AP3 indicates that students improve with respect to the BAS performance and is suggestive of improvement on the SEL. However, comparisons are limited as the SEL is not available for students above Level N and is not capable of the range of measurement available in BAS for English.

Figure 45. Grade 2 Dual Language Students Comparison of BAS vs. SEL 2016/17, Gaining Proficiency in Both Languages



Note: markers represent student combined performance on BAS and SEL. Students with same scores "stack" such that multiple students may be represented by each marker.

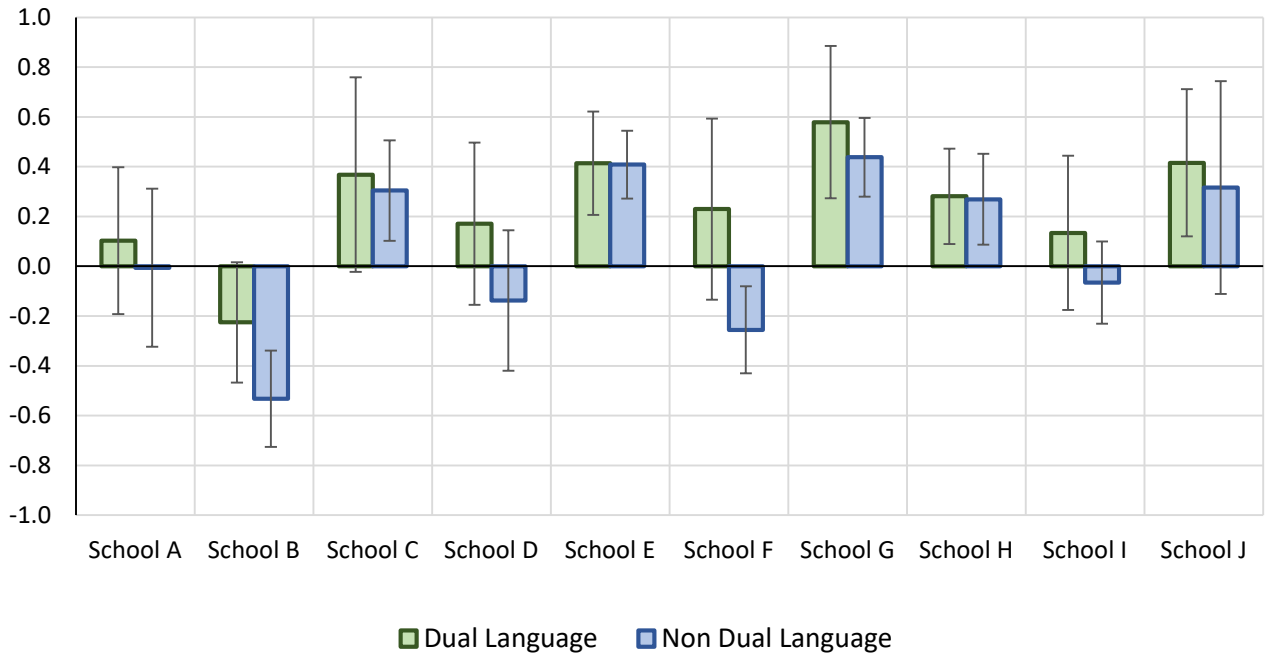
A second analysis examined the impact of participation in the Dual Language program on the third grade Florida Standard Assessment English Language Arts (FSA-ELA) scores. The graph, reproduced in Figure 46, displays the results of a regression analysis with the resulting mean residuals associated with the Dual Language (DL) and Non-Dual Language (NDL) students at each school after controlling for (equalizing) the students' 2016 Grade 2 Primary Reading Test scores. The analysis was computed across all third-grade students Districtwide who had both 2016 PRT and 2017 FSA-ELA scores. Mean residuals were computed for DL and NDL students for each of the 10 schools offering the Dual Language program at third grade in 2016/17; only the schools offering the DL program at grade 3 were included in the figure. The following observations may be gleaned from the figure:

- Nine of the 10 DL groups registered positive mean residuals, suggesting that, overall, DL students score higher than Districtwide modeled expectations on the FSA-ELA.
- Four of the DL groups registered mean scores that were statistically above 0 (i.e., we can have some confidence that they performed better than Districtwide model-based expectations).
- In five of the schools (Schools C, E, G, H, J), NDL students tended to show performance comparable to their DL peers, suggesting that students in these schools performed about the same regardless of dual language participation.
- In two schools (B and F), DL students scored statistically higher than their NDL peers.

Taken together, these data suggested that DL students perform as well as, or better than, their peers in the same schools on an English language assessment. However, there are limitations to this analysis. First, students are placed in the DL program by parent request, which suggests there may be family support and motivation differences between the DL and NDL groups. These family differences cannot be explored with the available data. However, other factors such as socioeconomic status, English language proficiency,

and disability status may contribute to FSA-ELA performance beyond the impact of prior reading ability and program participation.

Figure 46. Standardized Residuals Grade 3, 2016/17



World Language Offerings

SIM reviewed student course enrollments for the 2017/18 school year to identify which world languages were offered at each school. Table 18 displays the number of schools serving elementary, and high school grade levels offering each available world language. Spanish emerged as the most common language offered at elementary, middle, and high school, followed by French.

Table 18
World Language Offerings by School Level, 2017/18

Language	Elementary	Middle	High
American Sign Language		1	6
Chinese	1	2	6
French	1	7	28
German			2
Italian			2
Japanese			1
Language/Lit International Studies			1
Latin			4
Portuguese			1
Spanish	53*	42	36
Spanish for Spanish Speakers		11	17

* Includes elementary schools offering the dual language immersion program.

Feeder Pattern Analysis

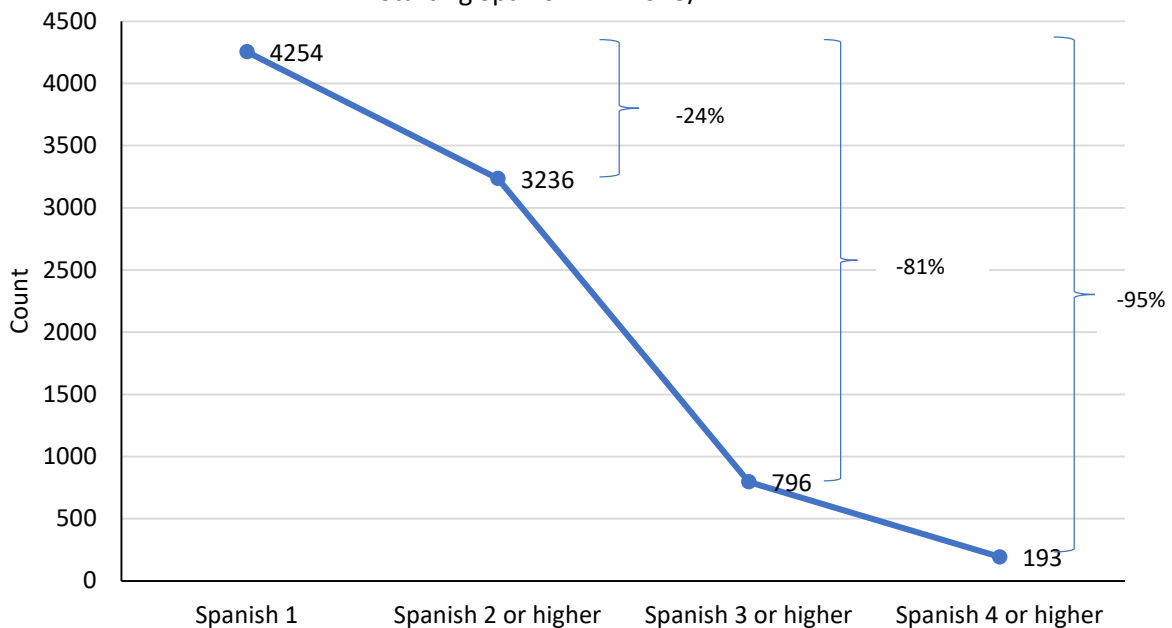
SIM also reviewed feeder pattern data to identify continuity of world language opportunities from elementary to high school. Each school may be part of multiple feeder patterns, students arriving at the same high school may have had different opportunities depending on the elementary and middle schools attended. Of the 355 possible feeder patterns, 110 (31%) offered world languages opportunities from elementary to high school (see Table 19). In most cases (108), the available language was Spanish. All feeder patterns from middle school to high school offered Spanish and 8 offered French.

Table 19
Summary of Feeder Pattern Analysis, 2017/18

	Count	%
Total Elementary to Middle to High Feeder Patterns	355	
Feeder Patterns Offering Spanish	108	30%
Total Elementary to Middle Feeder Patterns	184	
Feeder Patterns Offering Spanish	63	34%
Total Middle to High Feeder Patterns	71	
Feeder Patterns Offering American Sign Language	1	1%
Feeder Patterns Offering Chinese	0	0%
Feeder Patterns Offering French	8	11%
Feeder Patterns Offering Spanish	71	100%

Finally, SIM provided an analysis of course taking trajectory for first time Spanish 1 students entering ninth grade (see Figure 47). Enrollment in Spanish drops after students complete their required two-course sequence, rarely reaching Spanish 4 or higher courses, indicating that students strive for the essential requirement with little interest in continuing to levels of conversational fluency. This may change, however, with expansion of the immersion programs at the elementary and middle school levels.

Figure 47. Sample Course Taking Trajectory - Ninth Grade Students Starting Spanish 1 in 2013/14



Ed Talk Report

The annual Ed Talk was held on November 4, 2017 to provide a forum for BCPS staff to engage in dialogue with students, parents, and the broader community concerning issues impacting education today. The 2017/18 Ed Talk focused on two keys to student success: personalized learning and life readiness. The first roundtable session, presentation and discussion focused on how the District is personalizing teaching and learning. The second roundtable session focused on social emotional and academic development with an emphasis on developing a greater understanding of the challenges facing our students and the resources that are available. Intervening between the two roundtable sessions, District staff reported on progress with regard to the Strategic Plan HQI Objectives of Literacy and Early Learning and Middle Grades Learning.

For the first time, Ed Talk was hosted at a school location: Hollywood Hills High School. By hosting the event at a school location, as opposed to the Broward County Convention Center or other venues, the cost was reduced from approximately \$25,000 to \$7,000.

During each roundtable discussion, participants' feedback was captured by a table facilitator, who entered the information into an electronic file. In addition, each participant provided evaluative feedback after each session by independently recording their ratings on an electronic form; these data were not discussed among the participants or otherwise recorded by the facilitator.

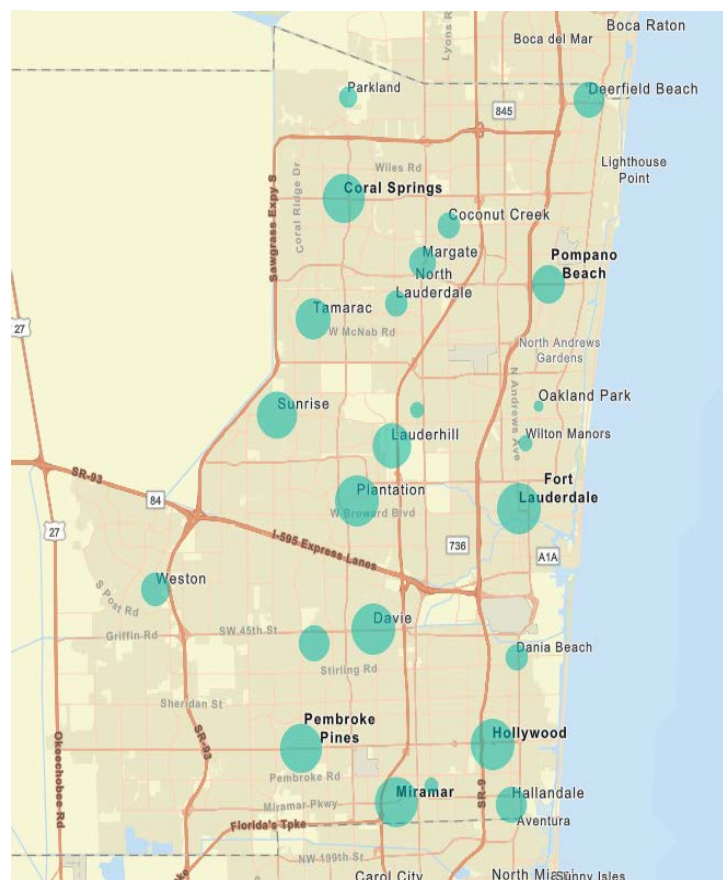
Participants

A total of 746 individuals registered online for Ed Talk in advance of the event, of which 256 (34%) attended. An additional 42 individuals who registered on-site on the day of the event also attended, yielding a total of 298 participants. A total of 247 participants (82.8%) completed feedback forms on which the following data summary is based. In addition, 144 District staff volunteers were on hand to ensure smooth execution of the event.

Of the 31 municipalities within Broward county, 24 (77%) were represented at Ed Talk. Figure 48 displays the geographical regions represented by the participants, with the size of the markers corresponding to the number of representatives.

The participants represented many groups from throughout the community. The largest groups represented included current K-12 students (27.2%, $n=65$) and BCPS Employees/Other [than teachers] (27.2%, $n=65$). Parents/Guardians (23.4%,

Figure 48. Geographical Regions Represented



$n=56$), BCPS Teachers (19.2%, $n=46$), and Community-Based Organizations (7.9%, $n=19$)⁸ round out the top five most represented groups. Note that some individuals indicated they represent more than one group, resulting in a total of 290 responses for this item (exceeding the 247 number of participants providing completed feedback forms).

Nearly half (47%) of respondents identified themselves as African-American/Black, followed by 28% self-identifying as Caucasian and 14% as Hispanic. Only 2 individuals (<1%) identified themselves as Asian/Pacific Islanders, indicating an under-representation for this segment of the community. Most participants were female (68%, $n=168$) compared to 71 males (29%) and 8 (3%) who did not specify their gender.

Most of the participants were 24 years old or younger (27%, $n=67$) followed closely by participants aged 45 to 54 years old (24%, $n=59$), and participants aged 35 to 44 years old (21%, $n=51$). Review of the educational attainment data indicates that a large segment of the 24 years old or younger age group are current K-12 students (20%, $n=49$). The majority of the participants were either college graduates (19%, $n=46$) or had completed graduate degrees (42%, $n=103$).

Most of this year's participants were attending Ed Talk for the first time (60%, $n=148$). Just over one-third (37%, $n=92$) indicated that they were returning participants. Further disaggregating the first-time Ed Talk attendees' responses revealed 78% of students and 76% of teachers were attending Ed Talk for the first time, compared to 46% of other BCPS staff and parents.

Session 1: Personalized Learning

Session 1 focused on how the District is personalizing teaching and learning for our students. The session included presentations by District staff and students as well as a hands-on demonstration at each of the discussion tables of personalized learning by leveraging technology such as CANVAS. Following presentations, participants at each of 39 tables were given an opportunity to share ideas. The discussion was framed around two questions:

1. What new ways could your school personalize learning to support its stakeholders (parents, students, teachers, administrators, community)?
2. What is the parent's role in fostering personalized learning?

Content from the participants' discussion was captured by the table facilitator, who summarized the information in an online form within CANVAS. The captured information was thematically coded by Program Evaluation staff; the emergent themes are summarized in Table 20 along with the number of tables addressing each theme.

⁸ Organizations targeted for Ed Talk include: Broward Education Foundation, Children's Services Council, Community Foundation of Broward, Greater Fort Lauderdale Alliance, Greater Fort Lauderdale Chamber of Commerce, Hispanic Unity of Florida, United Way of Broward County, and Urban League of Broward County.

Table 20
Emergent Themes for Discussion Session 1

Theme	Tables Addressing Theme	
	Number	Percent
Parent Involvement and/or Communication	29	74%
Increasing Parent Knowledge	28	72%
Teaching and Support for Individualized Learning Styles	22	56%
Provide More In/Out of School Programs	14	36%
Community Involvement and/or Communication	11	28%
Technology Use	9	23%
Elective/Academic Course Offerings/Pathways	9	23%
Communication with Students	8	21%
Real-World Experiences	7	18%
Academic Support/Tutoring for Students	7	18%
Career/Technical Options	7	18%
Social Emotional Learning support	5	13%
Teacher Professional Development	5	13%
Teacher Knowledge/Understanding of their Students	4	10%
Student Participation in Clubs/Sports	4	10%
Better Resources	2	5%
Student Autonomy	2	5%
Promote Diversity	2	5%
More Teacher Effort	1	3%
Physical Activity	1	3%

Most tables addressed three themes: the importance of parent involvement and communication with the schools; the need to increase parents’ knowledge about how they can assist their child; and that teachers need support to craft instruction to complement their students’ learning styles. The predominance of parent-related themes is likely due to the comparatively large representation of parents at the event.

Following discussion, each participant was asked to rate the relevance of personalized learning for BCPS (Figure 49), the level of discussion participation at the table (Figure 50), and the likelihood that the ideas shared about personalized learning could improve the academic experience for students (Figure 51).⁹ Responses to these items indicated that the participants saw the discussions around the topic of personalized learning to be relevant, engaging, and potentially impactful for our students.¹⁰

⁹ The small number of no-responses for each item were excluded from the figures.

¹⁰ Additional analyses (likelihood ratio) were conducted to determine whether the pattern of responses differed across respondent groups. In all cases, differences were non-significant.

Figure 49. In your view, was the discussion about personalized learning at your table relevant to student learning in Broward County Public Schools?

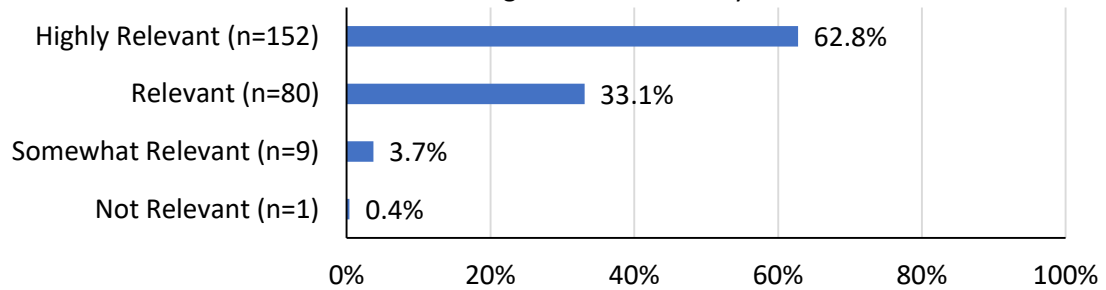


Figure 50. Which statement best describes the level of participation during the discussion at your table?

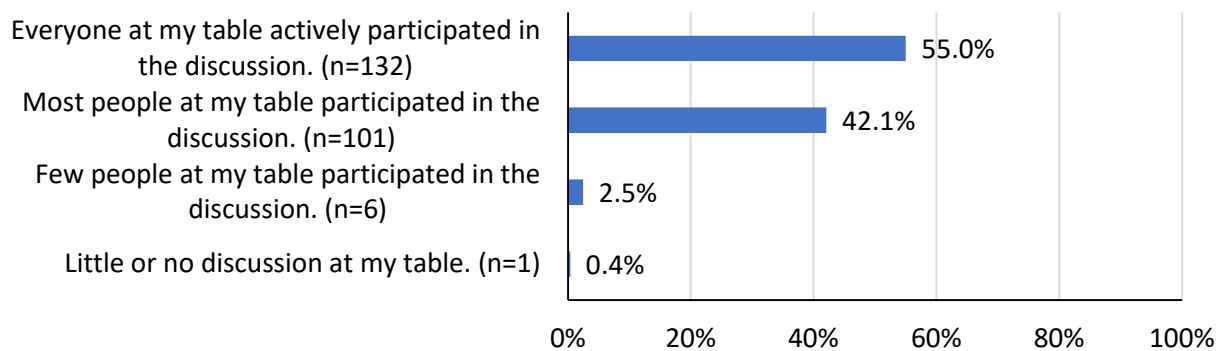
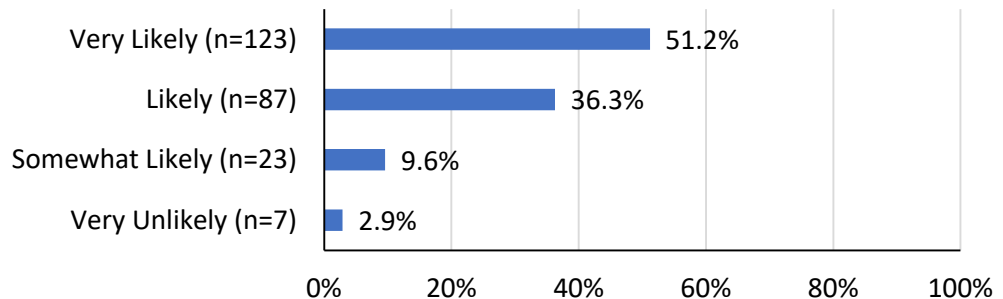


Figure 51. How likely will the ideas shared about personalized learning at your table improve academic experiences for students?



Strategic Plan Update

The Strategic Plan Update section of the program consisted of the District sharing information with the attendees concerning two major strategic initiatives: Literacy and Early Learning, and Reimagining Middle Grades Learning. While there was no participant table discussion on these sessions, the participants did respond to one feedback item for each strategic initiative. Figure 52 shows that most participants strongly agreed (40%) or agreed (52%) that the District is making progress on Literacy and Early Learning after the first year of implementation. With regard to Reimagining Middle Grades Learning, which is presently in the planning stage, most participants strongly agreed (35%) or agreed (59%) that the district is moving in the right direction (see Figure 54).

Figure 52. In your opinion, BCPS is making progress with regard to Literacy and Early Learning.

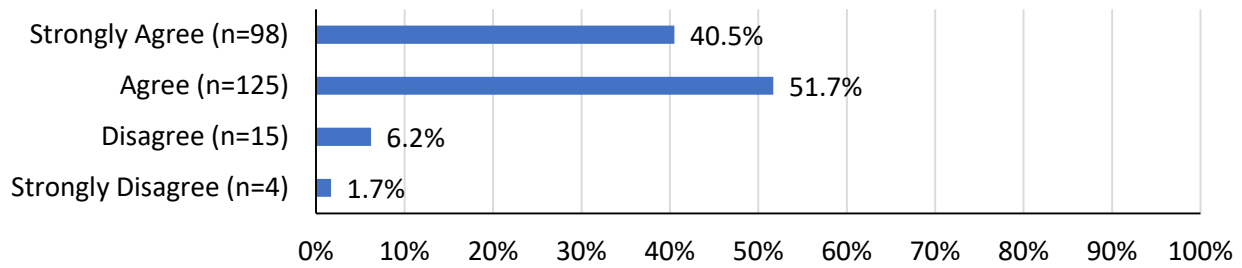
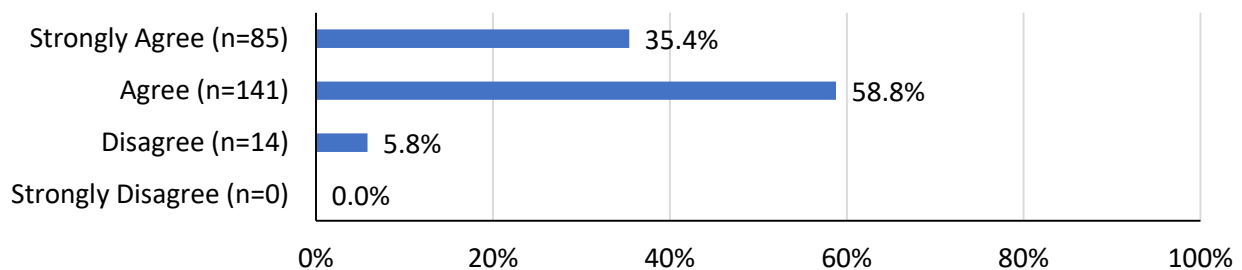


Figure 53. In your opinion, BCPS is moving in the right direction with Reimagining Middle Grades Learning.



Session 2: Life Readiness

Session 2 provided another opportunity for participants to interact and share ideas, this time about helping students develop life readiness skills. The guiding questions for the discussion were:

1. What can we do to create the conditions for students to demonstrate their social emotional learning skills and develop life skills to be happy and successful participants of a global society?
2. What is the community's role and how is the role implemented?
3. What is the parent's role and how is the role implemented?
4. What is the school's role and how is the role implemented?

Once again, the table facilitator captured the ideas shared during the discussion and entered the ideas into an electronic data form. The recorded ideas were again extracted and coded for summarization (Table 21). The themes were categorized according to whether they addressed the Community, Parents, School, or cut across categories (General).

Table 21
Emergent Themes for Discussion Session 2

Theme	Tables Addressing Theme	
	Number	Percent
Community - Input	21	54%
Community - Provide Real-World Opportunities	19	49%
Community - Partnerships	19	49%
Community - Support Non-School activities	9	23%
Community - Decision Making	6	15%

(table continues)

Table 21 (continued)
Emergent Themes for Discussion Session 2

Theme	Tables Addressing Theme	
	Number	Percent
Parents – Involvement	32	82%
Parents - Increase Knowledge	24	62%
Parents - Give Students Greater Autonomy	5	13%
School - Provide/ Improve Social and Emotional Learning (SEL) services	26	67%
School - Environment	22	56%
School - Student Support	22	56%
School - Mentoring	11	28%
School - Teacher Support/Professional Development	8	21%
School - Provide Activities /Clubs for students	5	13%
School - Encourage Student Self-Expression	2	5%
School - Leadership Opportunities	2	5%
General - Social Emotional Learning	26	67%
General - Demonstrate Learning in Multiple Contexts	5	13%
General - Out of School Activities	4	10%

Once again, each participant was asked to rate the relevance of life readiness for BCPS students (see Figure 54), the level of discussion participation at the table (see Figure 55), and the likelihood that the ideas shared about personalized learning could improve the academic experience for students (see Figure 56). Responses to these items indicated that the participants saw the discussions around the topic of life readiness to be relevant, engaging, and potentially impactful for our students.

Figure 54. In your view, was the discussion about life readiness at your table relevant to student learning in Broward County Public Schools?

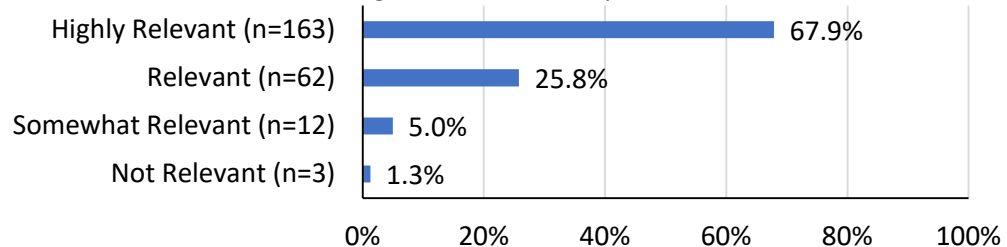


Figure 55. Which statement best describes the level of participation during the discussion at your table?

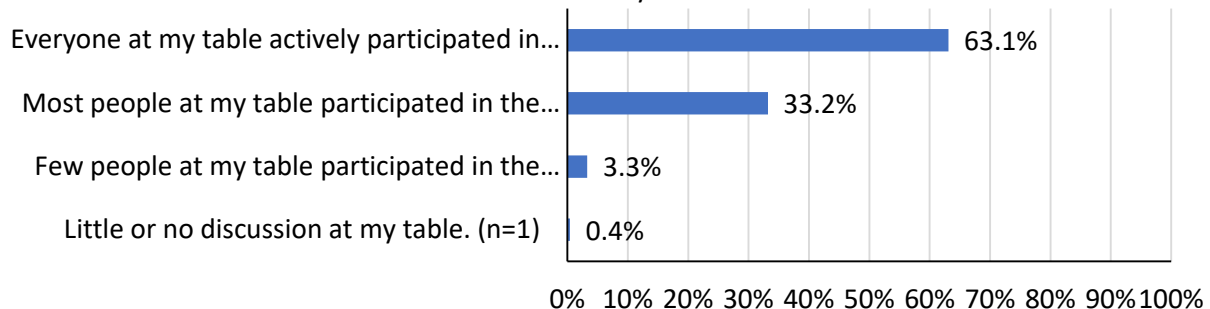
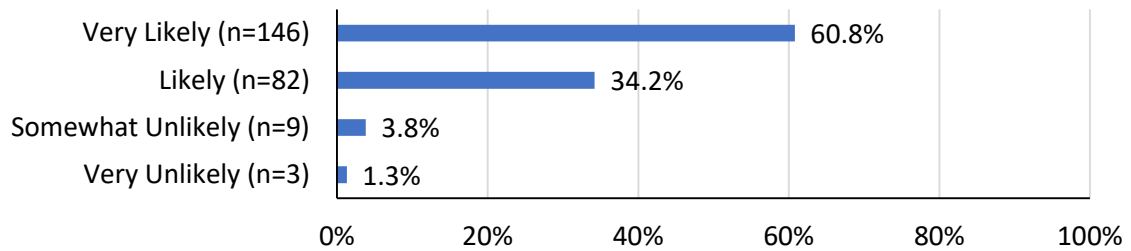


Figure 56. How likely will the ideas shared about life readiness at your table improve academic experiences for students?



Closing Session

Following the final discussion session, the participants were asked to provide a final round of ratings concerning the Ed Talk event overall. The impressions they shared were very positive. First, most participants strongly agreed (58%) or agreed (39%) that their views, as expressed at the event, were valued by the District. Second, most participants indicated that it was very likely (68%) or likely (25%) that they would attend another Ed Talk event in the future.

The participants also indicated how they had heard about Ed Talk. Most said they found out via email (22%) and the District website (21%). Few indicated they found out from the newspaper (<2%).

The participants were also given an opportunity to provide written feedback on ideas for improving Ed Talk by responding to three open-ended questions:

- What suggestions do you have to improve Ed Talk?
- What topics should be addressed in Ed Talk?
- What additional comments would you like to share?

Responses to each of these questions were thematically coded; the identified themes are summarized below.

Suggestions for Improvement. A total of 190 of the 247 (77%) participants wrote some response to the request for improvement suggestions. Of these responses, 152 substantive suggestions were extracted. These suggestions could be categorized according to the broad themes listed in Table 22.

Table 22

Identified Categories of Suggestions to Improve Ed Talk

Theme	Count
More Active Participation Opportunities	32
Improved Facilitation	30
Adjustments to Venue	20
Student Participation	19
Time Allocated for Event or Segment	17
Topics for Discussion	13
Follow-Through on Learning	11
Advertisement and Recruitment	10

Suggestions for Topics. A total of 146 of the 247 (59%) participants wrote some response to the request for topic suggestions. Of these responses, 142 substantive suggestions were extracted. These are summarized in Table 23.

Additional Comments. The additional comments offered tended to be largely evaluative with 54 of the 84 comments (64%) expressing a positive sentiment (e.g., “The program was wonderful,” “Good job,” “Thank you”). Only two comments were expressively negative (“Too dark. Crowded space. Attendants at parking were not sure where event was.” and “This got boring so if it was more fun, it would be good.”). Twenty-seven comments offered suggestions that were largely captured in the preceding two open response questions.

Table 23
Identified Topics for Ed Talk

Topic	Count
College/Career/Life Skills	20
Character Education/Social Emotional Learning	19
Parent/Family Support	18
Student-Selected	14
Academic Programs	13
Teacher Support/Pay	8
Community Involvement	6
District Current Events/Outreach	6
Testing/Assessment	6
Exceptional Student Education	5
Policy	4
English Speakers of Other Languages	3
Accountability	2
After School	2
Behavior/Discipline	2
Bullying	2
Lunch/Meals	2
Safety	2
Other*	8

*Other topics include one response each: attendance, clubs, diversity, graduation, immigration, private school support, school-home communication, and technology.

Discussion

The 2017/18 Ed Talk event continued the annual dialogue among students, parents, teachers, District staff, and the broader community. This year’s event brought several innovative changes. First, the traditional venue at the Broward County Convention Center or other commercial forum was replaced by a school site, thereby providing an authentic school environment for the participants to experience. This change of forum was generally well-received, with feedback that Ed Talk should rotate to different school sites throughout the county.

Second, this year a more detailed participant feedback procedure was used which rated each segment of the program during the course of the event. The two central discussion sessions were rated independently

by each participant with regard to relevance of the topic, level of participation among the participants, and perceptions of potential for impact on student experience. Responses to all these of these items were largely favorable for both discussion topics.

The event feedback procedure also collected perceptions of the program overall. The participants overwhelmingly indicated that they felt their views are valued by the District and they would likely attend another Ed Talk event in the future. However, intentions may not always align with actual behaviors. Case in point: More than 90% of participants indicated that they would likely attend another Ed Talk event, but only slightly more than one-third (37%) of this year's participants had attended before.

Although the feedback from the participants was largely positive and participation was active, the value of the Ed Talk largely comes from whether the District learns anything from the participants, and whether the input can be put into action. District staff are encouraged to review the information contained herein to inform planning and practice around personalized learning and life readiness. The information contained herein will also prove valuable in continuous improvement for Ed Talk implementation.

School is Cool

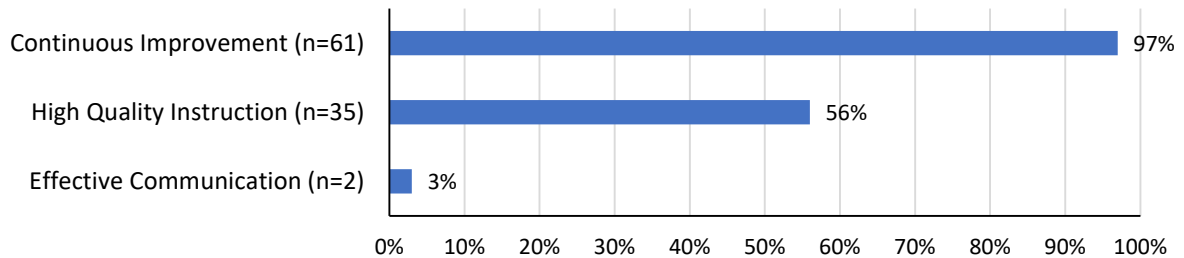
The Community Foundation of Broward (CFB) has sponsored the School is Cool program to target support for middle school students who struggle in English Language Arts and Mathematics and exhibit attendance and behavior problems. Through their support, CFB matches schools with community-based partner organizations to provide volunteers to provide services to eligible students. During planning for the 2017/18 implementation of School is Cool, SIM was invited to discussions focusing on enhancing data collection and analysis. Prior to 2017/18, CFB did not have a reliable method of tracking students who were served in the program, relying on paper-based records. SIM created an online tool for the tracking of students who were served, the interventions they received, and the providers of the interventions. This information became the basis for mid-year and end-of-year reporting on student progress conducted by Student Assessment and Research department staff in consultation with SIM.

Program Evaluation & Research Report Overview

Broward County Public Schools' Institutional Review Board (IRB) and Research Review is a systematic process for reviewing and approving all research conducted in our schools to ensure compliance with ethical research practices while providing value to the District. As part of the return on value, approved researchers are required to submit reports of findings following the completion of each study. This function was overseen by the Program Evaluation department from inception through SIM restructuring in July 2018 when IRB and Research Review was transitioned back to the Student Assessment and Research (SAR) department. A review of IRB and Research Review reports was completed prior to the transition to SAR.

Since 2015, reports received have addressed a myriad of K12 educational topics in curriculum and pedagogy, student support, subgroup performance, staff and operations, and other K12 issues. A recent review of the external reports ($n=63$) received to date revealed alignment with one or more of the District's Strategic Plan Goals of Continuous Improvement (97%), High-Quality Instruction (56%), and Effective Communication (2%) as shown in Figure 57.

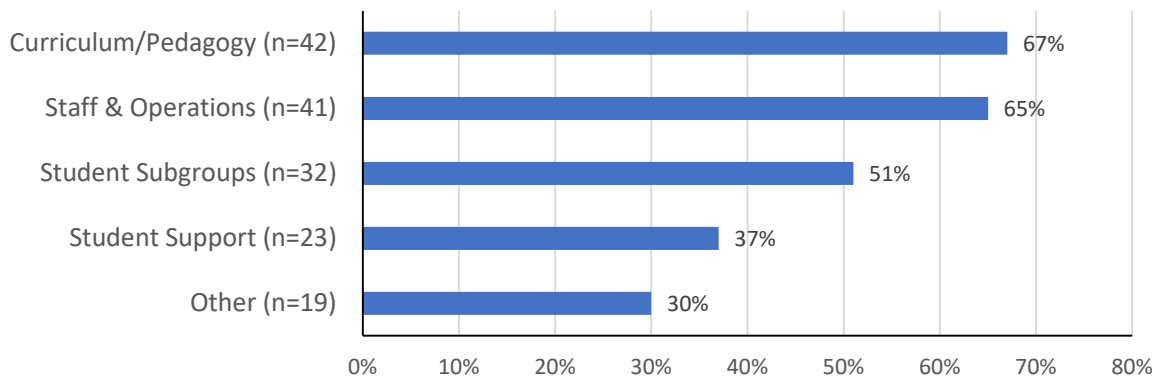
Figure 57. Research Report Alignment to Strategic Plan Goals



Reports categorized by school level indicate research was equitably distributed between elementary (40%, $n=25$), middle (35%, $n=22$), and high (44%, $n=28$) schools, with lower representation of centers (22%, $n=14$) and adult education (6%, $n=4$).

Examination by research topic (see Figure 58) shows most reports focused on issues related to curriculum and pedagogy (67%, $n=42$) and staff and operations (65%, $n=41$). About half of the reports received addressed student subgroups (51%, $n=32$) and approximately one third addressed student support (37%, $n=23$) and other K12 issues (30%, $n=19$). Research reports may be categorized in more than one topic.

Figure 58. Research Report by Topic



Research report topics are categorized by school level and 28 areas of specialization:

- | | | |
|--|--|--|
| <p><u>Curriculum/Pedagogy</u></p> <ul style="list-style-type: none"> • PreK/Early Literacy • Reading & Literacy • Math • Science/STEM • Social Studies • RTI • Digital Learning | <p><u>Student Support</u></p> <ul style="list-style-type: none"> • School Climate • Crime & Safety • Behavior/Discipline • Health/Sex Education • SEL/PASL • Mental Health | <p><u>Student Subgroups</u></p> <ul style="list-style-type: none"> • ESE • ELL • ESOL • Low Income • Minority/Achievement Gaps • Low Performing Schools • Gifted/Advanced |
| <p><u>Staff & Operations</u></p> <ul style="list-style-type: none"> • Teaching & PD • Leadership • Strategy & Operations • Other | <p><u>Other</u></p> <ul style="list-style-type: none"> • Graduation/HS Reform • Parent/Community Involvement • CTACE • Title I • Charter Schools/Choice | |

An interactive spreadsheet with report links is available from SAR for staff to sort and filter findings according to their specific needs.

A breakdown of projects approved by the IRB and Research Review during for the 2016/17 school year ($n=61$) show that most projects were dissertations (54%, $n=33$), followed by an equal number of studies conducted for partnerships (21%, $n=13$) and universities or agencies (21%, $n=13$). A small number of research projects were mandatory (3%, $n=2$). More than half of dissertations (70%, $n=23$) were conducted by BCPS staff.

Managing for Results – Council of the Great City Schools (CGCS)

BCPS uses key performance indicators (KPIs) published annually by the Council of the Great City Schools (CGCS) to inform its practices and drive performance improvements across operations. The SIM Office has institutionalized the use of KPIs at BCPS in two ways: first, by including KPIs as a focal point of Performance Management reviews; and second, by publishing the *Broward Benchmarking Report* at the beginning of each calendar year.

To produce the *Broward Benchmarking Report*, the SIM office collects the latest KPIs and examines how they have developed over time. Across many of the KPIs, the SIM Office has built up a three- to six-year view by consolidating the KPIs published by CGCS since the 2010/11 school year. The multi-year view allows BCPS to look at trends over time, which can provide insights into the impact of the District's investments, policy changes, new state laws, etc. Moreover, the KPIs are benchmarked against other large Florida districts, and districts across the nation that consistently rank in the top quartile. The SIM Office confers with District departments to review KPI trends for their respective functional areas, to suggest peer districts for best practice sources and most importantly, to understand the context behind BCPS's reported KPIs.

There are many limitations to CGCS's KPI reporting (for example, the data is over one year old when it is published), but it is the best available source for a wide array of public school district KPIs. Member districts share demographic characteristics but differ in funding and organizational setup which impact KPIs dramatically. Thus, for any benchmark to provide a useful reference it is important to understand the context behind the KPIs that are reported. If accurately reported, member district KPIs provide reasonable and useful benchmarks.

While the *SIM Annual Outcomes Report* examines outcomes for the 2017/18 school year, the benchmarking results listed here actually reflect District results from the 2015/16 school year due to the time delay in KPI publication by CGCS. Highlights are below:

- 1) Overall, there were no significant changes in KPI types, definitions or counts reported between the most current CGCS report and the prior one.
- 2) BCPS collectively across all operations INCREASED its number of BEST QUARTILE rankings from 25 to 26, driven by improved KPIs in Transportation, Risk Management and Procurement.
- 3) Across focus areas, BCPS Food Services KPIs are MIXED. Meal participation rates among Free or Reduced Lunch (FRL) students fell. Meals per labor hour have plateaued, while the fund balance continues to improve.
- 4) Across focus areas, BCPS Information Technology KPIs continue to IMPROVE.

- 5) While teacher retention continues to be a major challenge, new teacher induction programs and additional support appear to have helped stem attrition.

Up until the 2017/18 school year, CGCS limited its KPI reporting to District operations. For 2017/18, however, CGCS published a pilot report on academic KPIs. In reviewing the pilot, the SIM Office flagged areas of concern over the quality and utility of the data. BCPS is working with CGCS to drive product improvements; the SIM Office hopes that more robust academic KPIs will be available in CGCS's next report.

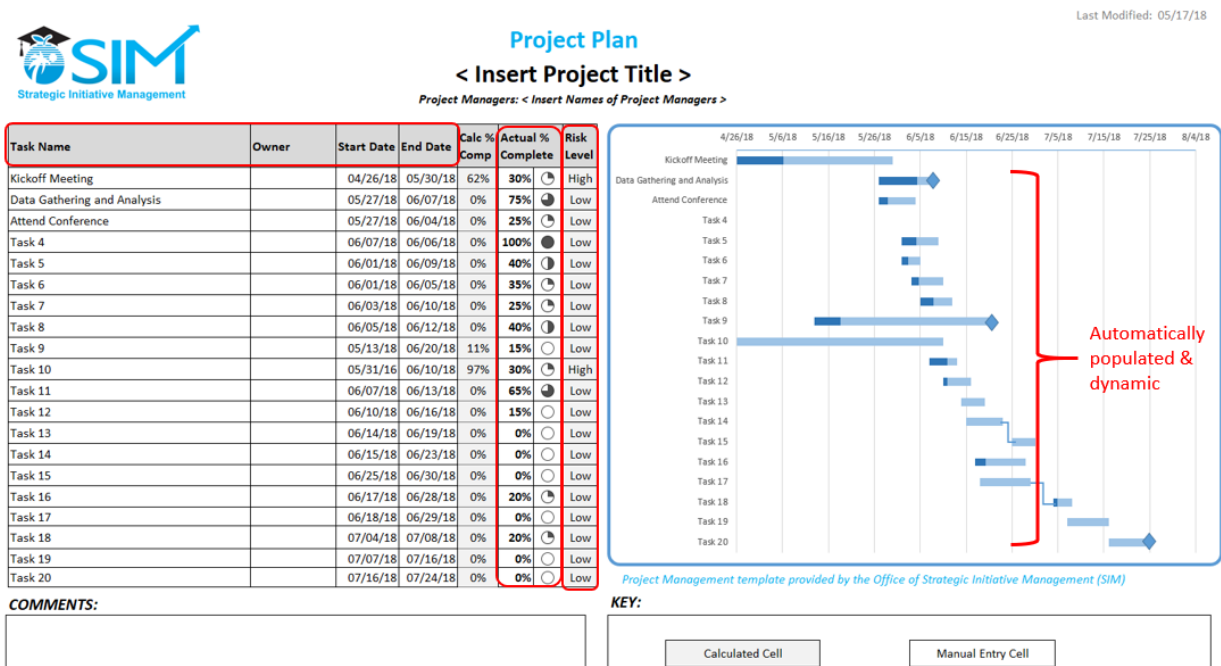
F. Deliverables – Toolkit Development

Within the newly defined SIM’s Menu of Services, a suite of management tools has been developed to support SIM’s engagement with District departments. SIM’s Menu of Services includes the Project Management Plan with Gantt chart, in addition to web tools, databases, surveys, planning retreats, focus groups, forms and Lean Six Sigma certification.

Project Management Plan with Gantt Chart

The Project Plan with Gantt chart provides a simple tool and method to create centralized plans with identified tasks, owners, timelines, status and alerting of risk. In this approach, accountability is driven through visibility. Project Plans represent documents of record and are living and breathing entities, managed by the project teams to reflect the current pulse of the initiative. This method is the standard for managing strategic initiatives and department projects, and is being utilized in numerous areas within BCPS, covering both academic and operational areas of focus. A sample of the Project Plan is shown in Figure 59.

Figure 59. Project Plan with Gantt Chart



Lean Six Sigma Certification

The new Executive Director of SIM, Dr. Deborah Posner enabled the SIM team to offer Lean Six Sigma White Belt and Yellow Belt certification to District staff. Dr. Posner is a certified Lean Six Sigma Black Belt and has trained and certified hundreds of education and business professionals, as well as college students, as White and Yellow Belts prior to her arrival at BCPS. Lean Six Sigma methodology is a recent addition to the education industry and focuses on improving quality, cost and accountability by standardizing processes and reducing waste, non-value-added work and cycle time. Courses will be offered to all District employees utilizing the MyLearningPlan (MLP) platform and certification earns in-service credit and digital badging.

Web Tools, Databases, Surveys, Planning Retreats, Focus Groups, Forms

Additionally, as part of the SIM Menu of Services and integrated within SIM's engagement with District departments is the creation of web tools, databases, surveys, planning retreats, focus groups and forms that facilitate the collection, analysis and management of data to inform the work. The type of tool developed is aimed at delivering a final product that is robust, user friendly and efficient. Common components include administrative capabilities, user and information security, ratings/rubrics, data attribution, exports and standardized/automated reporting. A listing of key SIM-developed web tools, databases, surveys and forms is below and illustrates the breadth of areas of focus and the importance of the subject matter being managed.

- 2019-22 Strategic Plan survey
- Community Foundation of Broward, School is Cool service log
- Marjory Stoneman Douglas Offers of Support log
- Reading Pals Volunteer log
- SIM Customer Service survey
- SIM Service Request form
- Superintendent's Screening Application tool
- Charter School Management Strategic Planning Retreat
- 2019-22 Strategic Plan Stakeholder Focus Groups

G. Deliverables – Ancillary Projects

Throughout this past year, there were several activities and business processes where SIM was actively involved in order to gain subject-matter expertise, further professional development and support key business functions. It must be noted that the re-alignment of the SIM team’s work to offering a menu of services also entailed a review and re-assignment of several of these ancillary business functions to the appropriate, go-forward departments. Activities for these business processes for last year are summarized below and the new departments managing them are also noted.

Research Study Support

Research conducted in BCPS for the purpose of evaluating the impact of a program or initiative on student outcomes must be approved by the District’s Institutional Review Board (IRB) and Research Review process. This process reviews the design, procedures, and potential impact of proposed research or program evaluation studies on school and district operations to ensure: (a) the purpose, scope, limitations, and duration of study is clearly outlined; (b) the protection of human subjects in the research process; (c) personally identifiable information (PII) is only used for purposes of the identified study; (d) PII is only used by representatives of the organization identified in this agreement; and (e) the safe and confidential storage and transmittal of education records.

Policy 6313

The District’s IRB and Research Review process is governed by [Policy 6313](#), *Research and Program Evaluation Studies*. This policy formally establishes the requirements for authorization to conduct research in BCPS, including:

- applicability of the policy,
- scope of the research and program evaluation activities,
- review and approval by the District’s IRB and Research Review process,
- compliance with ethical standards and laws governing the protection of human research participants, and
- compliance with additional School Board Policies pertaining to student records, confidentiality, and technology usage.

This policy was originally adopted on June 22, 1967 and previously amended on May 20, 1971. To revamp this policy and ensure alignment with current legal and ethical standards, Program Evaluation staff undertook a review of federal and state laws and guidelines, examined the codes of research ethics of the American Psychological Association and the American Education Research Association, and reviewed the policies of other large school districts in addition to reviewing current District processes concerning research studies. The resulting revisions to Policy 6313 was approved and amended on November 7, 2017.

IRB & Research Review

The IRB and Research Review process was originally developed and managed by the Student Assessment and Research (SAR) Department. The transition of the Evaluation Administrator position responsible for overseeing this process to the Program Evaluation department during the 2016/17 school year, brought the IRB and Research Review process under the leadership of this department within the Office of Strategic Initiative Management (SIM). Following the review and amendment of Policy 6313, Program

Evaluation staff successfully transitioned all IRB-related functions back to the SAR department in July 2018.

External Consultants

Additional processes that were transitioned back to SAR include the Consultant Pool and Hiring processes. The Consultant Pool was established to identify experienced K-12 researchers and program evaluators for use by District stakeholders. This process identifies qualified researchers by evaluating proposers based on specific K-12 research criteria and protocol including qualifications, experience, research skills, and quality of writing.

The Consultant Hiring Process was established to assist District stakeholders and ensure that consultants who can best meet a department’s specific research needs are hired. The Consultant Hiring Process ensures that the quality of research activities provided by external evaluators meet the District’s high research standards for the students, parents and staff of BCPS. Departments are required to follow the Consultant Hiring Process to hire consultants from the BCPS Consultant Pool for their research needs.

Both processes were originally designed and managed by SAR but transitioned to the Program Evaluation department with the staff realignment in 2016/17. Following a review of these processes, resulting in a streamlined and automated process designed to better serve internal stakeholders, these functions were transitioned back to SAR in July 2018 to better align the function with the scope and work of SAR and SIM.

Continuous Improvement Conference (CIC) Professional Development & Presentation

The SIM team proudly served as the keynote speakers at this year’s Continuous Improvement Conference (CIC) at Broward College. This event was founded by Dr. Deborah Posner for cross-industry professionals to share best practices in process improvement using Lean Six Sigma. Over one-third of the conference attendees were from BCPS and helped to raise over \$17,000 toward student scholarships at Broward College.



Dr. Deborah Posner, Executive Director of SIM, presenting at the Continuous Improvement Conference 2018 at Broward College on July 30, 2018.

Buck Institute Workshop & Visioning Professional Development

As part of the focus on RMG, BCPS has partnered with the Buck Institute for Education (BIE) in co-development of the strategy for Problem- and Project-Based Learning (PBL) in schools. As a kickoff to BIE engagement, key BCPS team members from Academics, OSPA and SIM participated in a Visioning Workshop for PBL hosted by the Buck Institute on April 19, 2018. This professional development session focused on initially defining the desired/future state of PBL for BCPS and then reflecting on the current state and what changes would be needed. The BIE facilitators led this discovery process through guiding questions on the topics listed below:

- Desired State: What Would Middle Schools look like in 2023?
- Current Reality in 2018?
- What Did We Do to Bridge the Gap?

- Did We Create the Best Scenario for Us?
- What Actions are Needed to Get to the Vision?
- What Do we Need to Know about Implementation at BCPS?

The team members that attended this workshop will participate in an Implementation Lab with BIE and work collectively to develop action plans for the tactical decisions that were defined in the Visioning Workshop. The District’s engagement with BIE is a multi-phased partnership and includes multiple tiers of professional development for administrators and teachers, school walk throughs, exemplars/best practices, modeling and other methods of continued engagement.

Harvard PIER Summit

Based on a competitive application process, BCPS was invited to participate in the Partnering in Education Research (PIER) Summit that was held at Harvard University’s Center for Education Policy Research (CEPR) in May 2018. The PIER Summit provided an opportunity for six invited education agencies from across the nation to collaborate with Harvard University faculty, graduate, and post-graduate students on education issues of high importance and mutual interest. The outcome of the collaboration was a design



Dr. Russell Clement, Director of Program Evaluation, presenting at the Continuous Improvement Conference 2018 at Broward College on July 30, 2018.

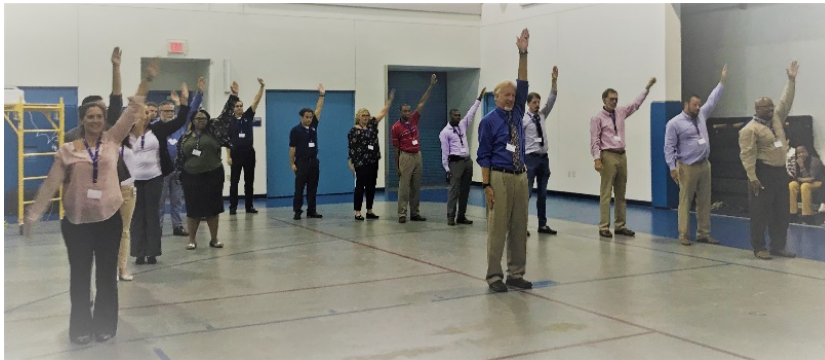
for a potential research study that could be implemented by the education agency. In a competitive forum, each team presented their proposed study to a panel of distinguished judges including John Easton, Vice President of Programs, Spencer Foundation & Former Director, Institute of Education Sciences; Will Marinell, Former Director of Analytics, CEPR; and Mark Schneider, Director, Institute of Education Sciences. The presentations were also open to a broader audience of Summit attendees and the Harvard community. One team was selected to receive support from CEPR to conduct the presented study.

BCPS was represented by Dr. Russell Clement, Director, Program Evaluation; Dr. Nicole Mancini, Director, Elementary Education; and Richard Baum, Director, Student Assessment and Research. The BCPS team was paired with a team from Harvard led by Professor

Jimmy Kim and graduate students Emily Hanno, Catherine Armstrong, and Kathryn Gonzalez. The focus of the collaboration concerned developing methods to explore the effectiveness of professional development on early literacy skills. The team identified three research questions and proposed a methodology to address each. The three questions were:

- RQ1. What are the patterns of teacher attendance and completion of early literacy-related professional development (PD)?
- RQ2. How does attendance and completion of early literacy PD relate to teacher implementation of literacy practices and student outcomes?
- RQ3. Does the opportunity to attend early literacy PD affect teachers’ literacy practices and student outcomes?

RQ1 would be addressed with descriptive methods, including examination of who participates in PD courses and timing of their participation. This analysis would include quantification of variation in PD attendance, completion within and across schools. RQ2 would be addressed using correlational methods to address PD associations with instruction and student outcomes. This analysis would also explore potential moderators between PD completion and impact on student outcomes. RQ3 would assess the causal impact of PD on instruction and student outcomes. Causal impact analysis is more rigorous than correlational analysis and employs experimental methods.



Dean Vaughan, Evaluation Administrator, Program Evaluation, leading team-building exercises at the Continuous Improvement Conference 2018 at Broward College on July 30, 2018.

In the end, the BCPS study was not selected for implementation support through CEPR. However, many elements of the design are viable and may yield valuable information for the early literacy initiative. Research design elements are being incorporated into the year three project plans.

IV. The Year Ahead

As we enter year three of execution on our current three-year Strategic Plan (2016-2019), it is time to pivot toward development of our new three-year Strategic Plan (2019-2022). It takes at least a full year to develop a new plan, especially for a District this large. SIM officially kicked off the new planning cycle with the first Strategic Plan (SP) Committee meeting held at the District’s Kathleen C. Wright administration building on July 17, 2018, and through an initial Board Workshop on August 14, 2018.

Figure 60 provides a timeline of events incorporated into the strategic planning process for the 2018/19 school year. Figure 61 shows a month-by-month breakdown of key strategic planning activities and milestones which SIM has mapped out and will be facilitating over the coming year, including a comprehensive environmental scan, data collection and analysis, surveys and focus groups, additional SP Committee meetings and Board Workshops, etc. These activities are aimed to ensure maximum stakeholder involvement at all levels (students, parents, teachers, community members, elected officials, and district and school-level administrators and staff), all of whom will collectively set the future direction for BCPS.



Strategic Plan Committee members discussing continuous improvement strategies during the Strategic Plan Kickoff meeting on July 17, 2018.

Figure 60. Strategic Plan Timeline



Figure 61. 2018/19 Strategic Planning Calendar

2018						
June	July	August	September	October	November	December
Kickoff: SP Steering Committee	Kickoff: SP Committee Meeting Data Analysis	Board Workshop: Strategic Plan Kickoff Board Workshop Data Analysis & Environmental Scan	Surveys, Interviews, & Focus Groups	Surveys, Interviews, & Focus Groups SP Committee Meeting	Survey, Interview, & Focus Group Analysis	Board Workshop: Strategic Plan -- Findings and Initial Recommendations

2019						
January	February	March	April	May	June	July
Goal & Initiative Development SP Committee Meeting	Goal & Initiative Finalization	Board Workshop: Strategic Plan Draft (aligned with Budget) Metric & Target Development SP Committee Meeting	Metric & Target Finalization Focus Groups	Graphic Design & Printing SP Committee Meeting	Board Workshop: Strategic Plan Final Adoption	2019-22 Strategic Plan Execution Begins

Key Strategic Planning Activities to be facilitated by SIM during 2018/19 include:

- Strategic Plan development that includes goals, initiatives, metrics, and targets, both long-term and short-term, for execution within 2019-2022
- Performing internal data analyses and an external environmental scan that considers – factors such as economic, legislative, industry, market, enrollment patterns, demographics, sister districts
- Performing extensive gathering of stakeholder input from across the community, via surveys, interviews, and focus groups
- Delivering training sessions on goal development, project management, accountability and execution, and process improvement
- Providing guidance on the development of supporting DASA and BASA goals to be cascaded down the organization, as well as departmental level KPIs
- Providing guidance on development of School Improvement Plans as needed
- Ensuring continued alignment between Strategic Planning and Budget cycles
- Coordinating with the Student Assessment and Research (SAR) team, and other areas as needed for acquiring data, and setting appropriate metrics and targets

- Monitoring and regularly reporting on progress of Strategic Plan development
- Providing recommendations for names of Project Managers and initiative implementation teams
- Assigning Subcommittees to perform periodic reviews of our Vision, Mission, and Values, and recommend updates as needed

All of the above activities are considered best practices in Strategic Planning and will be facilitated by SIM in partnership with the Strategic Plan (SP) Committee. The SP Committee is scheduled to meet 5 times during the 2018/19 Academic Year. The Cabinet will serve as the Steering Committee at the District for Strategic Planning; the existing Cabinet meeting schedule will be utilized for needed updates and input.

V. Conclusions and Recommendations

The conclusions presented in this report are associated primarily with those initiatives on which the work of the SIM team concentrated most heavily. A convergence of interactions, observations, quantitative and qualitative data around the District's strategic initiatives leads us to the following conclusions:

- 1) **Sustainability of the District's comprehensive Early Literacy program was successfully demonstrated, and student outcomes are positive.** The environmental, instructional, assessment, and intervention components of the program are aligned, and the checks, balances, and systems that inform the District's progress are in place. However, communication from the District to schools concerning BAS *instructional vs. independent* end of year performance expectations should be consistent and with the understanding that these scores index different levels of performance; an *instructional "P"* reader has not reached the same literacy level as an *independent "P"* reader. Moving forward, there remains much opportunity to refine the program using available analytics and to reach more teachers with PD opportunities. For instance, regarding the 44% of teacher participants that had not completed the Benchmark Assessment System PD prior to participation in the Calibration Conversations, steps are needed to ensure that teachers had completed the foundational course prior to Calibration Conversations so that they are prepared to partake in the intended activities of these visits.
- 2) **Instrumental planning progress was made around Reimagining the Middle Grades experience but moving from planning to implementation has taken longer than expected.** Powerful proof points of that progress include: extensive outreach to principals, teachers, and students; secured funding commitments; completion of PD visioning sessions; and the expansion of ALLign camps. However, to reimagine middle grades is an enormously complex undertaking, and initial funding uncertainty contributed to delays. Schools have many options for how they implement project- and problem-based learning. To understand which options are the most effective will take time, as will the scaling of PD to reach a critical mass of teachers. New (grant-funded) staff must be recruited and on-boarded. Moreover, the acquisition and administration of an SEL instrument and instructional materials must occur for the SEL project to be implemented with fidelity. Feedback mechanisms to inform the RMG initiative are essential.
- 3) **The new normal demands a new vision from the District.** The high school learning tactics outlined in the current Strategic Plan need to be reviewed and adjusted to meet this new normal while preparing all students with life-ready skills. Intensive deliberation among high school principals concluded that BCPS graduates should be socially and emotionally aware, possess employability skills, exhibit post-secondary preparedness, and define his or her personalized pathway. Student happiness, agency, critical consciousness, and independent learning are imperative. When the project plans are developed for implementation, attention to the new State legislation—passed after the incident at Marjory Stoneman Douglas High School—places new demands on the District with regard to safety, security, and recovery.

- 4) **The District needs a comprehensive strategy to address funding uncertainty.** Elements of the District’s situation are entirely predictable irrespective of the availability or scarcity of resources. For example, buses and buildings will get older and will need to be repaired or replaced. More stability around funding for the predictable can help BCPS in the long run be better prepared for the unpredictable. Voter and legislative outreach that seek increases in state and local funding sources should be accompanied by initiatives aimed at increasing student enrollment. Enrollment initiatives should focus, at a minimum, on educational quality and student well-being, communications, brand, and community engagement.
- 5) **Benchmarks from CGCS must be referenced with care; it is better for the District to benchmark against its own past performance over time.** Across the 70 CGCS member districts, contextual differences such as organizational set-up and funding models can render a vastly different view of performance. Because they are funded more similarly to BCPS, other large Florida districts provide better benchmarks, although they too should be examined with caution. More importantly, now that the District has been collecting and reporting KPIs for seven years, there’s arguably greater value in benchmarking the District against its past performance and understanding trends over time. In that way, KPIs can be mapped back to business decisions such that BCPS can better ascertain the impact of those decisions on District performance.
- 6) **Hiring flexibility is needed to facilitate smoother transitions.** Often the hiring process can take months, which jeopardizes the District’s ability to transfer or maintain institutional knowledge as well as the level of services that it provides. When it is known that a vacancy is imminent, the flexibility to begin the hiring process before the vacancy materializes—possibly through the onboarding of new staff—will help minimize skills gaps.
- 7) **Adjustments are needed for the SIM framework and process to scale up successfully.** Expansion of the SIM framework and process to cover the RMG initiative while sustaining the Early Literacy program exposed scale challenges. The regular collection, management, analysis, and use of data to make decisions exists in pockets of the organization, but often requires extensive support from SIM. Moreover, the adoption and use of project planning tools has not matured to the level where all Project Managers are independently developing and using them to manage their work or communicate progress or risks. The simplification of existing tools, the operationalization of data collection, additional PD around project management (e.g., Lean Six Sigma white belt training), and regular dialogs with the Cabinet and Board to reaffirm priorities are recommended approaches to help SIM better address scale challenges.
- 8) **Optimize SIM workload balance to accommodate demand for new, expanded service of Process Improvement Projects (PIPs),** which identify opportunities for maximizing efficiency, reducing costs, eliminating waste, ensuring quality, and enhancing customer service.
- 9) **Define clearer metrics** for Strategic Plan Goal 2 Continuous Improvement (CI) and Goal 3 Effective Communication (EC) in the 2019-22 Strategic Plan.

These conclusions will inform the planning cycle now underway for year 3 of the current strategic plan, as well as the development of the District’s next strategic plan for the 2019 – 2022 timeframe.

VI. Appendix

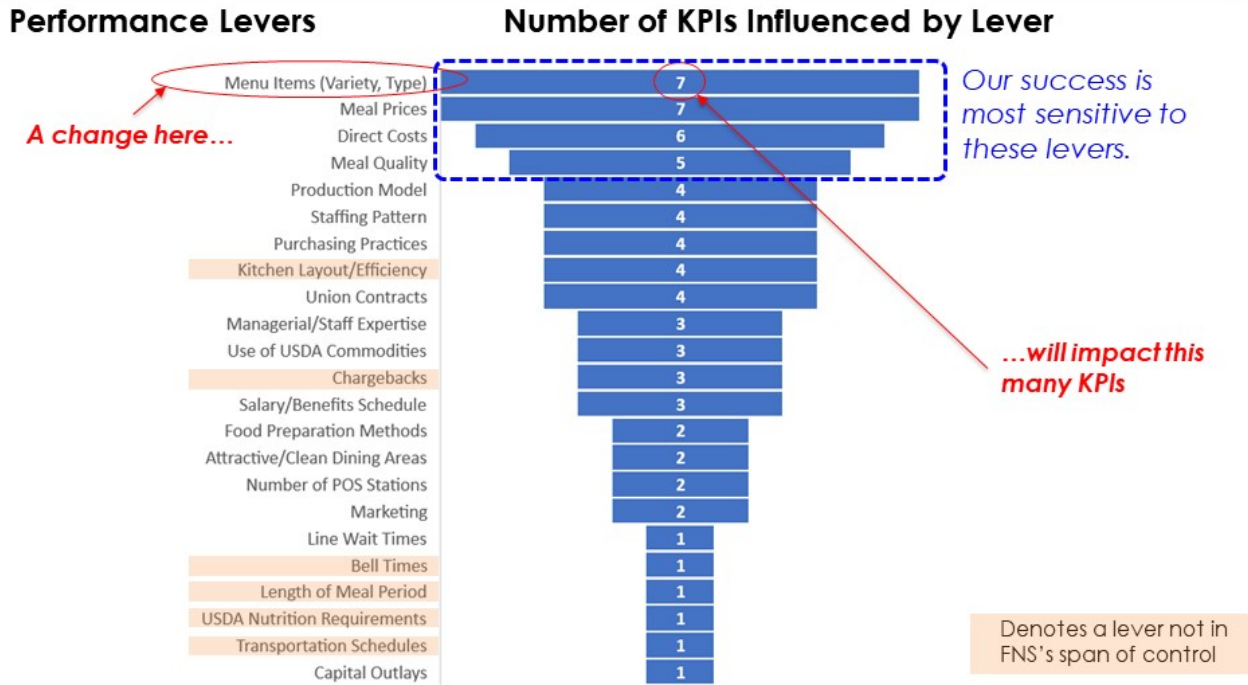
Appendix A – SIM Menu of Services

Roles and Responsibilities of Strategic Initiative Project Team

Role	Value-add	Activity	Input(s)	Rec'd. from	Output(s)	Provided to
Executive Sponsor	Provides strategic direction: Identifies the "why" and "how", and mobilizes team	Analysis of current situation	<ul style="list-style-type: none"> Relevant data (e.g., Student data) Strategic Plan task force Theories of Action Stakeholder feedback 	<ul style="list-style-type: none"> Data owners (e.g., SAR) Key stakeholders 	<ul style="list-style-type: none"> Strategy and Tactics Targets Identification of Portfolio Manager and Project Managers 	<ul style="list-style-type: none"> SIM Team Portfolio Manager Project Managers
	Drives key decisions	Facilitate execution	Status updates	<ul style="list-style-type: none"> SIM Portfolio Manager 	Decisions, interventions, escalations	Cabinet
Portfolio Manager	<ul style="list-style-type: none"> Drives collaboration Marshals resources Identifies risks 	Project coordination and oversight	<ul style="list-style-type: none"> Strategy and Tactics Project Plans Project Status Updates 	<ul style="list-style-type: none"> Portfolio Sponsor Project Managers 	<ul style="list-style-type: none"> Portfolio Charter Portfolio status updates 	<ul style="list-style-type: none"> Portfolio Manager SIM Team
Project Manager	<ul style="list-style-type: none"> Sets expectations around project execution Addresses and removes roadblocks 	Project planning	<ul style="list-style-type: none"> Identified and prioritized needs Survey of available resources 	<ul style="list-style-type: none"> Portfolio Sponsor Portfolio Manager Team members 	Project Plan	<ul style="list-style-type: none"> Portfolio Manager SIM Team Team members
	Converts inputs into deliverables	Product design and development based on identified needs	Varies	Team members	Project deliverable	Stakeholders
	Drives collaboration	Task coordination and oversight	Task timelines and statuses	Team members	Project status updates	SIM Team

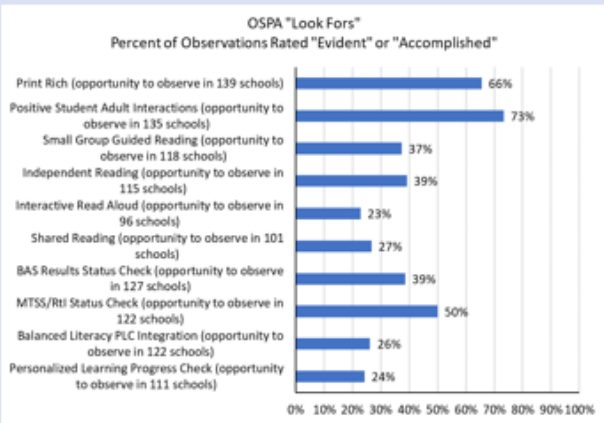
Appendix B – Sample Tornado Visualization

“Tornado” Visualization: Sensitivity Analysis Example Levers Influencing our Performance in Food and Nutrition Services



PERFORMANCE MANAGEMENT REVIEW: FOOD AND NUTRITION SERVICES (FNS)

Appendix C – Sample Project Scorecard

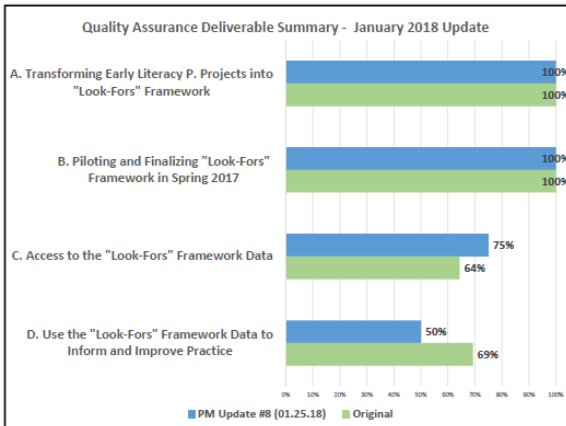
Strategic Plan Goal 1: High-Quality Instruction — Literacy and Early Learning Focus																																																	
Strategic Plan Tactic and Associated Project — Quality Assurance																																																	
Strategic Initiative Management (SIM) — Year Two Scorecard																																																	
<p>Project Manager: Mark Narkier Start Date: July 1, 2016 Planned End Date: June 30, 2018</p> <p>Overview Our Theory of Action is that if all folios within the Literacy and Early Learning portfolio are implemented with high fidelity, then BCPS will be successful at creating highly literate students. Successfully having students become independent readers will require high quality plans, professional development, resources, fidelity of implementation, and feedback systems that are done far in excess of compliance. BCPS must implement and monitor the quality of implementation with the expectation of high quality practices, continuous improvement and measurable results.</p>	<p style="text-align: center;">Process/Output Metrics</p> <p style="text-align: center;">Distributions of fidelity of Implementation on 8 "look fors" (POM.e.13)</p> <div style="text-align: center;"> <p>OSPA "Look Fors"</p> <p>Percent of Observations Rated "Evident" or "Accomplished"</p>  </div>																																																
<p>Phase</p> <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="background-color: #333; color: white;">Strategy</td> <td style="background-color: #333; color: white;">Prioritization</td> <td style="background-color: #333; color: white;">Initiation</td> <td style="background-color: #333; color: white;">Planning</td> <td style="background-color: #333; color: white;">Execution</td> <td style="background-color: #333; color: white;">Closing</td> </tr> </table>		Strategy	Prioritization	Initiation	Planning	Execution	Closing																																										
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<p>Project Schedule</p> <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="background-color: #90EE90;">On Plan</td> <td style="background-color: #FFDAB9;">Delay</td> <td style="background-color: #FFB6C1;">At-Risk</td> </tr> </table>		On Plan	Delay	At-Risk																																													
On Plan	Delay	At-Risk																																															
<p>Deliverables</p> <p>A. Transforming Early Literacy P. Projects into "Look-Fors" Framework B. Piloting and Finalizing "Look-Fors" Framework in Spring 2017 C. Access to the "Look-Fors" Framework Data D. Use the "Look-Fors" Framework Data to Inform and Improve Practice</p>																																																	
<p>Status & Next Steps</p> <p>Status Overview</p> <p>Major Year One Achievements & Issues: 1. The tremendous collaboration between all of the team members of the Office of Academics and Office of School Performance and Accountability with a deliberate focus on the accomplishment of the goals identified in the strategic plan.</p> <p>Next Steps</p> <p>1. Project Managers rotate Cabinet Meetings; Schedule in development, first visit is January 2018.</p>	<p style="text-align: center;">Implementation Update</p> <table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th rowspan="2"></th> <th colspan="6" style="text-align: center;">Deliverables</th> </tr> <tr> <th style="text-align: center;">A</th> <th style="text-align: center;">B</th> <th style="text-align: center;">C</th> <th style="text-align: center;">D</th> <th style="text-align: center;">E</th> <th style="text-align: center;">F</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Deliverables Status</td> <td style="text-align: center;">●</td> <td style="text-align: center;">●</td> <td style="text-align: center;">●</td> <td style="text-align: center;">●</td> <td></td> <td></td> </tr> <tr> <td style="text-align: center;">Schedule</td> <td style="text-align: center;">On Plan</td> <td style="text-align: center;">On Plan</td> <td style="text-align: center;">On Plan</td> <td style="text-align: center;">On Plan</td> <td></td> <td></td> </tr> <tr> <td style="text-align: center;">Total Tasks</td> <td style="text-align: center;">6</td> <td style="text-align: center;">6</td> <td style="text-align: center;">3</td> <td style="text-align: center;">7</td> <td></td> <td></td> </tr> <tr> <td style="text-align: center;">Advanced or Completed</td> <td style="text-align: center;">6 100%</td> <td style="text-align: center;">6 100%</td> <td style="text-align: center;">3 100%</td> <td style="text-align: center;">6 86%</td> <td></td> <td></td> </tr> <tr> <td style="text-align: center;">End Date</td> <td style="text-align: center;">03/17</td> <td style="text-align: center;">05/17</td> <td style="text-align: center;">06/18</td> <td style="text-align: center;">06/18</td> <td></td> <td></td> </tr> </tbody> </table> <p>Additional Consideration(s) of Program Sponsor(s)— for example commentary, budget, staff skills, competing demands, leveraging collaboration tools, etc.</p>		Deliverables						A	B	C	D	E	F	Deliverables Status	●	●	●	●			Schedule	On Plan	On Plan	On Plan	On Plan			Total Tasks	6	6	3	7			Advanced or Completed	6 100%	6 100%	3 100%	6 86%			End Date	03/17	05/17	06/18	06/18		
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Total Tasks	6	6	3	7																																													
Advanced or Completed	6 100%	6 100%	3 100%	6 86%																																													
End Date	03/17	05/17	06/18	06/18																																													

Appendix D – Sample Project Risk Register

Literacy & Early Learning - Risk Register

Project Manager Update: 01/25/18

Quality Assurance

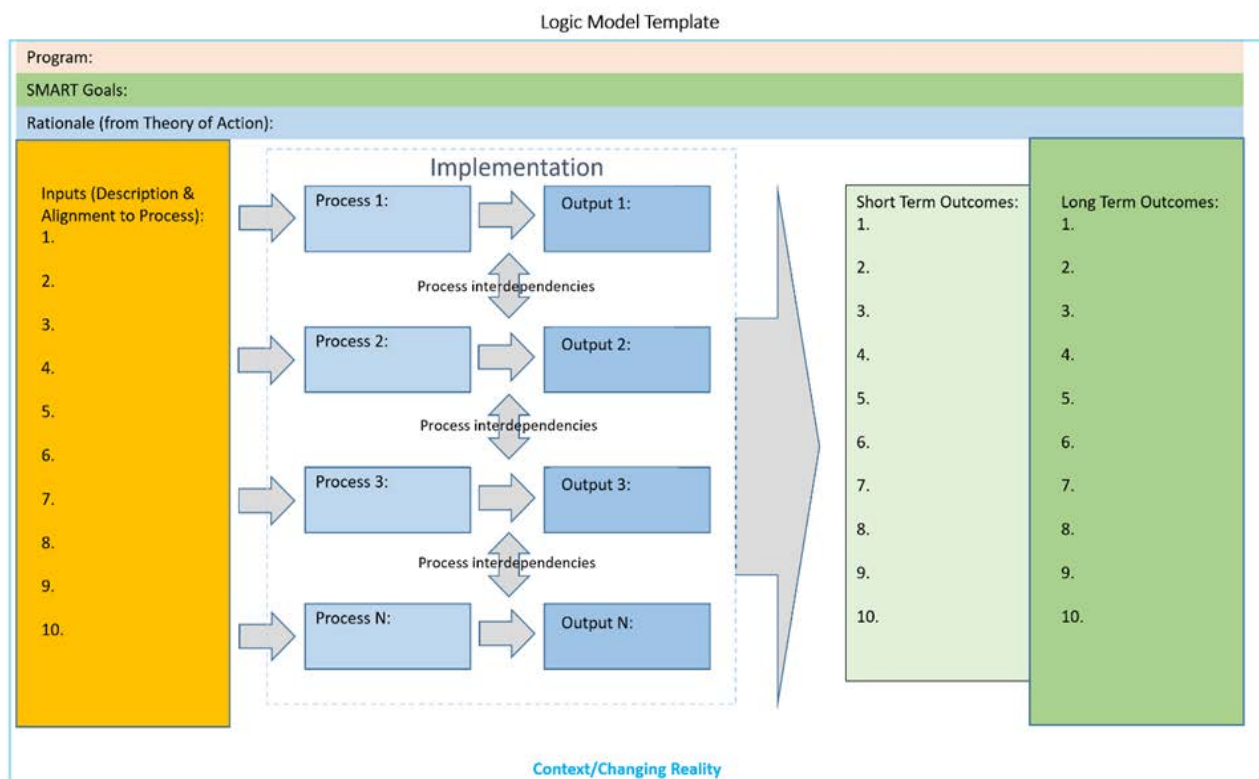


Note: Tasks are reflected on the Risk Register if the Current Status % Completion varies 25% or greater from Original Estimate (behind schedule).

Deliv. Task	Task Description	Status %	Original %	Risk Type				Next Steps
				Scope	Effort	Resources	Other	
D:1	Report on insights gleaned from implementation of "Look-Fors" and feedback from school administrators, teachers, and students through stakeholder presentation vehicles (Directors Meeting, Collaborative Team Meeting, Cabinet, etc) to improve instructional practice and instructional leadership	50%	100%		X			Task D:1, D:5: Ongoing process throughout 2018. Insights gleaned from Look-Fors (D:1) are very detailed and when combined with new available data comparisons (BAS, PD, Summer Slide, correlations), completion of this task requires more time than originally slotted. Extended time will result in improved strategy for Round 2 observations (May).
D:3	Identify strategies and provide guidance for schools to provide teachers release time for professional learning opportunities (i.e., PLCs, Early Release Days, Professional Study Days, TDAs.)	25%	100%				X	Task D:3: During our initial visits, conversations transpired at the schools regarding incorporation of Balanced Literacy into PLCs, Early Release, Teacher Planning Days, TDAs, etc. These visits enabled some progress in this area, however, contractual constraints impact this initiative, specifically, current definitions of time available to Principals, School-based PD Team allocation of the 24 hours of professional development, TDA concerns, and etc.
D:4	Identify strategies and provide guidance for schools to strategically maximize use of allocated funding sources for teachers to implement Balanced Literacy Framework (Substitutes, Human Resources, Instructional Materials, Grants, etc.)	0%	100%				X	Task D:4: Original estimated date was incorrect because this task should be completed during projected budget season.
D:5	Develop and disseminate plan for appropriate human resource deployment and support based on individual school needs	0%	100%				X	

Appendix E – Sample Logic Model

A **Logic Model** translates the Theory of Action into operationally-defined processes with specific outputs. The Logic Model specifies the **inputs** (resources such as materials, personnel, technology, etc.), **processes** (e.g., curriculum, data analytics, professional learning, etc.) that use those resources that result in **outputs** or deliverables (e.g., documentation of implementation, number of percent completed). Each process has a rationale for its necessity to achieve the desired **outcome(s)** (i.e., measures like test scores or behavior that is the focus of the program for change). Interdependencies, as well as temporal contingencies, among processes must be identified. Measurable data are derived from each of the process outputs in the form of leading indicators and from the short- and long-term outcomes which provide measures of impact. Successful completion of the Logic Model yields operationally-defined processes and measures that will be examined in subsequent evaluation analysis and reporting. All Logic Models include inputs, processes, outputs, and outcomes; however, the logic models format are customized to the particular program needs. Below is an example of a Logic Model template.



Appendix F – List of Acronyms

ACCESS: Assessing Comprehensive and Communication in English State-to-State	MTSS: Multi-Tiered System of Supports
AFC: Association of Florida Colleges	NDL: Non-Dual Language
AP: Administration Period	OM.e: Outcome Metric - Elementary
APQC: American Productivity & Quality Center	OSPA: Office of School Performance and Accountability
BAS: Benchmark Assessment System	PASL: Personalization for Academic and Socio-emotional Learning
BASIS: Behavioral and Academic Support Information System	PBL: Project-Based Learning
BC: Broward College	PD: Professional Development
BCPS: Broward County Public Schools	PDU: Plan Development Update
BIE: Buck Institute for Education	PE: Program Evaluation
BSA: Broward Standards Assessment	PII: Personally Identifiable Information
CCR: College and Career Readiness	PIP: Plan Development Update
CEPR: Center for Education Policy Research	PM: Performance Management
CFB: Community Foundation of Broward	PMP: Progress Monitoring Plan
CGCS: Council of the Great City Schools	POM.e: Process Outcome Metric - Elementary
CI: Continuous Improvement	PPO: Physical Plant Operations
CIC: Continuous Improvement Conference	PRT: Primary Reading Test
CogAT: Cognitive Abilities Test	PWS: Procurement and Warehousing Services
DL: Dual Language	RMG: Reimagining the Middle Grades
EC: Effective Communication	ROCs: Receiver Operator Curves
ELA: English Language Arts	Rtl: Response to Intervention
ELL: English Language Learners	SAR: Student Assessment and Research
ESE: Exceptional Student Education	SBBC: School Board of Broward County, Florida
ESOL: English for Speakers of Other Languages	SEL: Social and Emotional Learning
FLKRS: Florida Kindergarten Readiness Screener	SIM: Strategic Initiative Management
FNS: Food and Nutrition Services	SLA: Service Learning Agreements
FRL: Free or Reduced Lunch	SMART: Safety, Music & Art, Athletics, Renovation, Technology
FSA: Florida Standards Assessment	SMWBE: Small, Minority, Women Business Enterprises
HQI: High-Quality Instruction	STEM: Science, Technology, Engineering, and Math
IO: Initiative Oversight	SP: Strategic Plan
IRB: Institutional Review Board	STFS: Student Transportation and Fleet Services
KPI: Key Performance Indicator	TSG: Teaching Strategies GOLD
MSDHS: Marjory Stoneman Douglas High School	VPK: Voluntary Pre-Kindergarten

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