



Developing Operational Metrics

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Why are Operational Metrics important?

- How do you know you're running an efficient operation?
- Allows for comparison to districts with similar demographics.
- Helps build credibility with School Board and Community.
- Helps identify effective management practices used by top performing districts, so other districts can utilize them where applicable.
- "What gets measured, gets..."
- Metrics should be meaningful, contribute to effective management, and add value.

Council of the Great City Schools



The Nation's Voice for Urban Education

- The Council of the Great City Schools is a coalition of 67 of the nation's largest urban public school systems.
- School districts eligible for membership must be located in cities with populations over 250,000 or student enrollment over 35,000. School districts located in the largest city of any state are also eligible for membership, regardless of size.
- Florida members include Miami-Dade, Broward, Hillsborough, Orange, Duval and Palm Beach County.
- Contact: Robert Carlson, Council of Great City Schools, rcarlson@cgcs.org



“Managing for Results in America’s Great City Schools”

- Annual survey of Key Performance Indicators (KPIs).
- Results are published and presented to School Boards and Superintendents during their annual fall conference.
- Project initially launched in 2006 and addressed only food service and transportation. Quality of survey instrument and responses continues to improve.
- Full report available at:
<http://www.cgcs.org/>



Project Purpose

- **To examine** how districts compare to their peers.
 - Assessing the trend of one's own performance is important, but comparing to peer groups puts the performance in context.
- **To learn** what effective practices are being used by top performing districts
 - Knowledge development of what other districts are doing to improve performance will assist operations and finance officers in their approach.
- **To apply** methods to improve performance by studying their circumstances and approaches.
 - Linking districts together while they apply new practices will create technical assistance support to maximize effectiveness.



Project Scope

- The CGCS Performance Measurement and Benchmarking Project includes four functional areas—
 - • **Operations** (includes Procurement, Food, Transportation, Security)
 - • **Finance**
 - • **Human Resources**
 - • **Information Technology**



Project Outcomes

- The benchmark data will provide districts with a focused view on where they perform well, and where they may have an opportunity for improvement.
- The “gap analysis” will provide districts with an inventory of effective practices they may be able to adopt to enhance their performance.
- Technical assistance from working with top performing districts will assist executives as they implement new practices.

Last year's KPI report



Acrobat Document

On-line Survey Instrument



Acrobat Document



- CGCS also developed an ***Award for Excellence in Financial Management***.
- Criteria derived from OPPAGA best practices, input from Bond Rating Agencies, and experience of veteran CFOs.
- Florida CFOs (Dr. Richard Hinds and Dr. Michael Bookman) were key architects in developing this award and criteria.
- Broward County Public Schools (Ben Leong & Team) first recipient of this award in October 2008.



- To receive this award, a district must achieve 95 percent or 2,309 of a possible 2,430 scoring points by complying with all 95 mandatory practices and a minimum of 41 of 53 recommended practices in the following nine categories:

- General Financial Management
- Treasury
- Internal Controls
- Capital Asset Management
- Budget, Strategic Planning & Management
- Debt Management
- Internal and External Financial Auditing
- Risk Management
- Purchasing



- Governor's Sterling Award – Brevard 2007 Recipient
- Information, application and criteria available on website:

<http://www.floridasterling.com/>

- Organizations submit a 50-page application that is scored against the seven categories of the Sterling Criteria:
 - 1) Leadership
 - 2) Strategic Planning
 - 3) Customer Focus
 - 4) Measurement, Analysis, and Knowledge Management
 - 5) Workforce Focus
 - 6) Process Management
 - 7) Results

What are the Sterling Criteria for Organizational Performance Excellence?

- Sterling/Baldrige is a proven management system that works in all sectors and all sizes of organizations.
- Based on National Malcolm Baldrige researched best practices of successful organizations
- The model is:
 - Management by fact
 - Continuous improvement
 - A communications tool

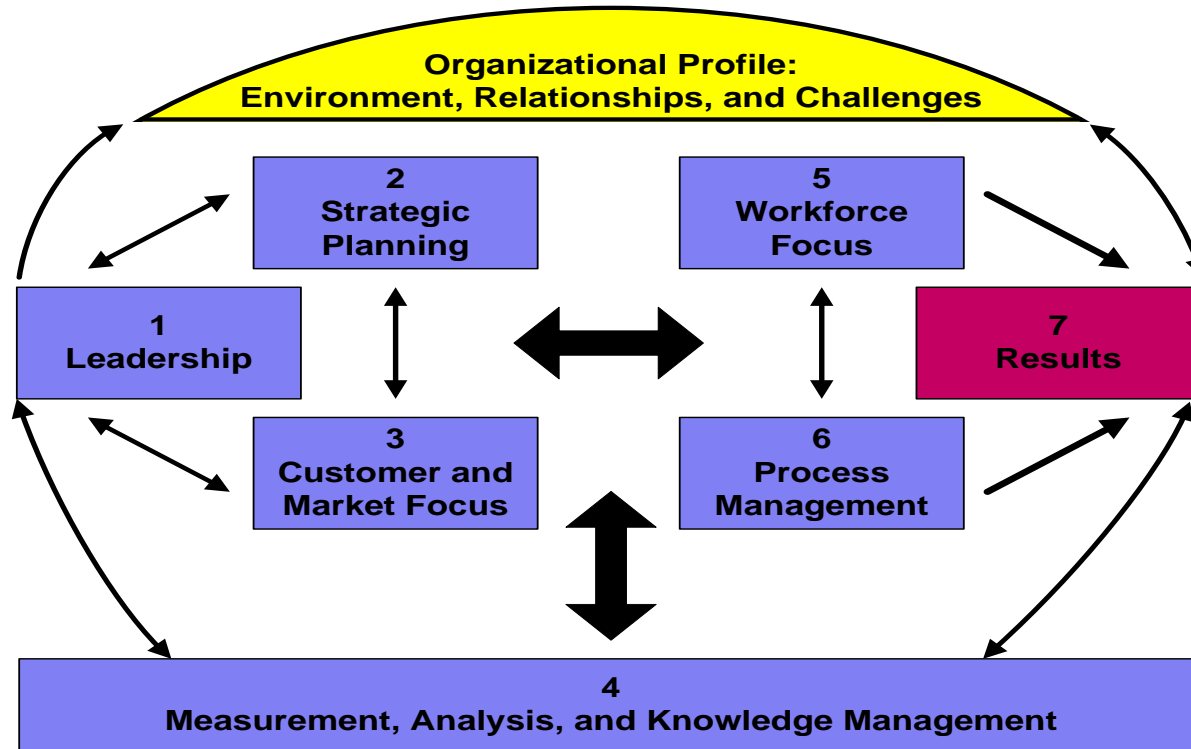


How does using the Sterling Management System help your organization get better?

- Define what's important
- Collect and communicate results
- Link work
- Use results for continual improvement



Sterling Management System



A comprehensive and integrated system



Thank you for your attention

Questions and Answers by Judy