

# Evidence-Based Accountability Plans

Measuring Progress Toward  
Strategic Goals and Accreditation  
Recommendations



Anne-Marie Balzano

Kelsey Vrooman



**Anne-Marie Balzano, EdD**

Mission & Data



**Kelsey Vrooman**

Mission & Data  
[@kvroomedu](https://twitter.com/kvroomedu)



# Agenda

1

What is Mission-Driven, Data-Informed Decision-Making?

2

A Framework for Taking Aspirations to Actions

3

Goals → Outcomes → Metrics

4

Unpacking the “Squish” and Bringing the Process Back to Your School

# *Mission* & DATA

Mission-driven, Data-informed Leadership and Governance

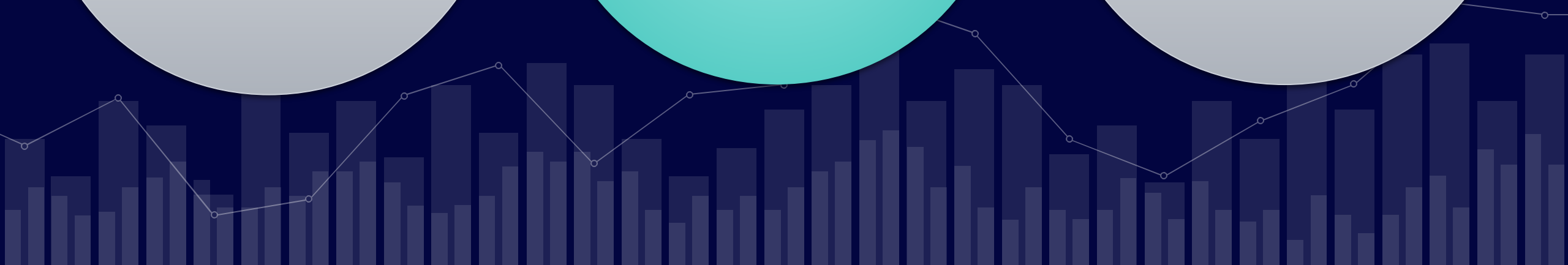
**Mission  
Driven**

+

**Community  
Centered**

+

**Data  
Informed**



# What Is Mission-Driven Data-Informed Decision Making?

1. **Shared Purpose**
2. Analysis
3. Create a Shared Understanding
4. Engage in Decision Making/Action Planning
5. Evaluate and Iterate

*What problem do we hope to solve -or- which question do we hope to answer?*

*Which data are relevant?*

● *Data types:*

- *Quantitative (numbers)*
- *Qualitative (narrative)*

# What Is Mission-Driven Data-Informed Decision Making?

1. Shared Purpose

**2. Analysis**

3. Create a Shared  
Understanding

4. Engage in Decision  
Making/Action Planning

5. Evaluate and Iterate

- *Do we have the data we need?*
  - *If so, where is it?*
  - *If not, how can we get it?*
- *Gather, clean, analyze, and visualize data.*
- *And remember, not all data is relevant.*

# What Is Mission-Driven Data-Informed Decision Making?

1. Shared Purpose

2. Analysis

**3. Create a Shared  
Understanding**

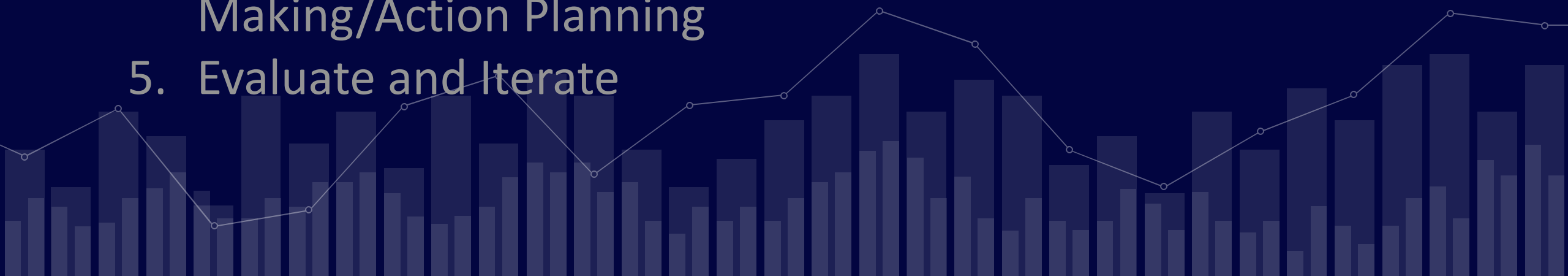
4. Engage in Decision  
Making/Action Planning

5. Evaluate and Iterate

*1. What do we see?*

*2. What does it mean?*

*3. Why does it matter?*





# What Is Mission-Driven Data-Informed Decision Making?

1. Shared Purpose

2. Analysis

3. Create a Shared  
Understanding

**4. Engage in Decision  
Making/Action Planning**

5. Evaluate and Iterate

- *Align to mission, vision, and values.*
- *Avoid “preferred solutions”*






# What Is Mission-Driven Data-Informed Decision Making?

1. Shared Purpose
2. Analysis
3. Create a Shared Understanding
4. Engage in Decision Making/Action Planning
- 5. Evaluate and Iterate**

*Are you measuring what matters? Are you sure what you're measuring is predictive?*

- *When your outcome is reached, are you closer to your goal?*
- *Are there false flags - outcomes that have no predictive weight to goal success?*
- *Is there a way to validate what you think is happening with feedback or check ins?*

A person with a backpack is walking across a suspension bridge that spans a deep valley. The scene is set at sunrise or sunset, with a warm, golden glow over a tropical forest of palm trees and other vegetation. The bridge is made of metal and has a simple railing. The person is silhouetted against the bright sky.

# **From Mission-Driven, Data-Informed Decision Making to Strategic Goals and Measuring Progress**

# Case Study

George Watson, chair of the Strategic Planning committee at The Carson School, was unsure what to do next. Last year, the school had completed what he thought was a very successful strategic planning process. The committee worked collaboratively with the head of school to ensure all school stakeholders were included, spent significant time collecting and analyzing relevant data, and engaged in several environmental scanning sessions to understand the broader trends that might impact Carson's future. The committee felt a great sense of pride when the strategic goals and priorities were voted on unanimously by the board. Carson's communication department had done a wonderful job marketing the plan to the wider community and prospective parents, including a short video on the school's website.

But after the fanfare of Spring 2021, there had been little mention of the strategic plan since. The strategic goals were not part of the first HOS report of the fall, although it was clear the opening weeks of the semester had gone smoothly. George had heard stories from other schools about strategic plans ending up on a shelf collecting dust, and he hoped this would not be the case for Carson.

# A Framework for Taking Aspirations to Actions

## Strategic Plan

- Works backwards from mission, vision, values
- Aspirational document capturing goals and desired outcomes

## Accountability Plan

- Identifies how outcomes will be measured
- Qualitative and quantitative metrics
- Establishes stage gates and time frames for measuring

## Action Plan

- Outlines major tasks for each strategic goal
- Identifies persons responsible
- Identifies resources needed
- Identifies timeline

## Implementation

- Teams engage in work
- Data and evidence of progress is collected, analyzed, and visualized
- Regular check-ins to monitor progress and course correct, if necessary

SO MANY  
different words  
to describe how  
to move from a  
30,000 ft vision  
to measurable  
progress.

KPIs Outcomes

SMART Goals

Metrics

Evidence

OKRs

Goals

Success Signals



# Goals, Outcomes, Metrics, Oh My!



- **Goals:** Goals are normally broad in scope, more aspirational/directional, and hard to measure.
- **Outcomes:** Outcomes are what you hope to achieve when you accomplish the goal. They are specific and measurable.
- **Metrics:** What we use to determine progress towards stated outcomes (data).

# It's All About Alignment





# Types of Outcomes

## Operational

*Improve fundraising efficiency through online tracking of donors*

## Tactical

*Increase enrollment by 25%*

## Performance

*Increase AP scores in associated advanced courses*

## Cultural/Subjective

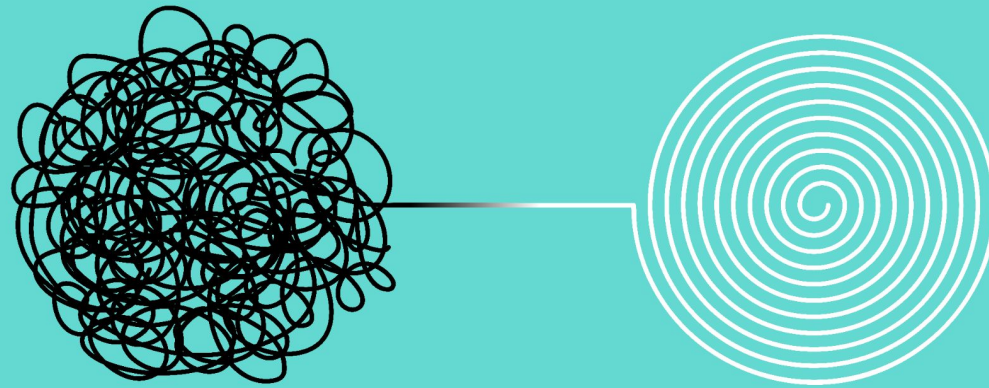
*Improve student health and wellbeing*

# Aligned Metrics

Operational, tactical and performance outcomes are concrete and data can be pulled easily to determine progress.

Cultural/Subjective outcomes are more complex and “squishy”. We use Google’s **Goals - Signals- Metrics** protocol.

Unpacking **squishy terms** ensures everyone has a shared understanding.



Don't assume your team, your head of school, or your board of trustees align on subjective terms.

# Unpacking Squishy Goals Example...



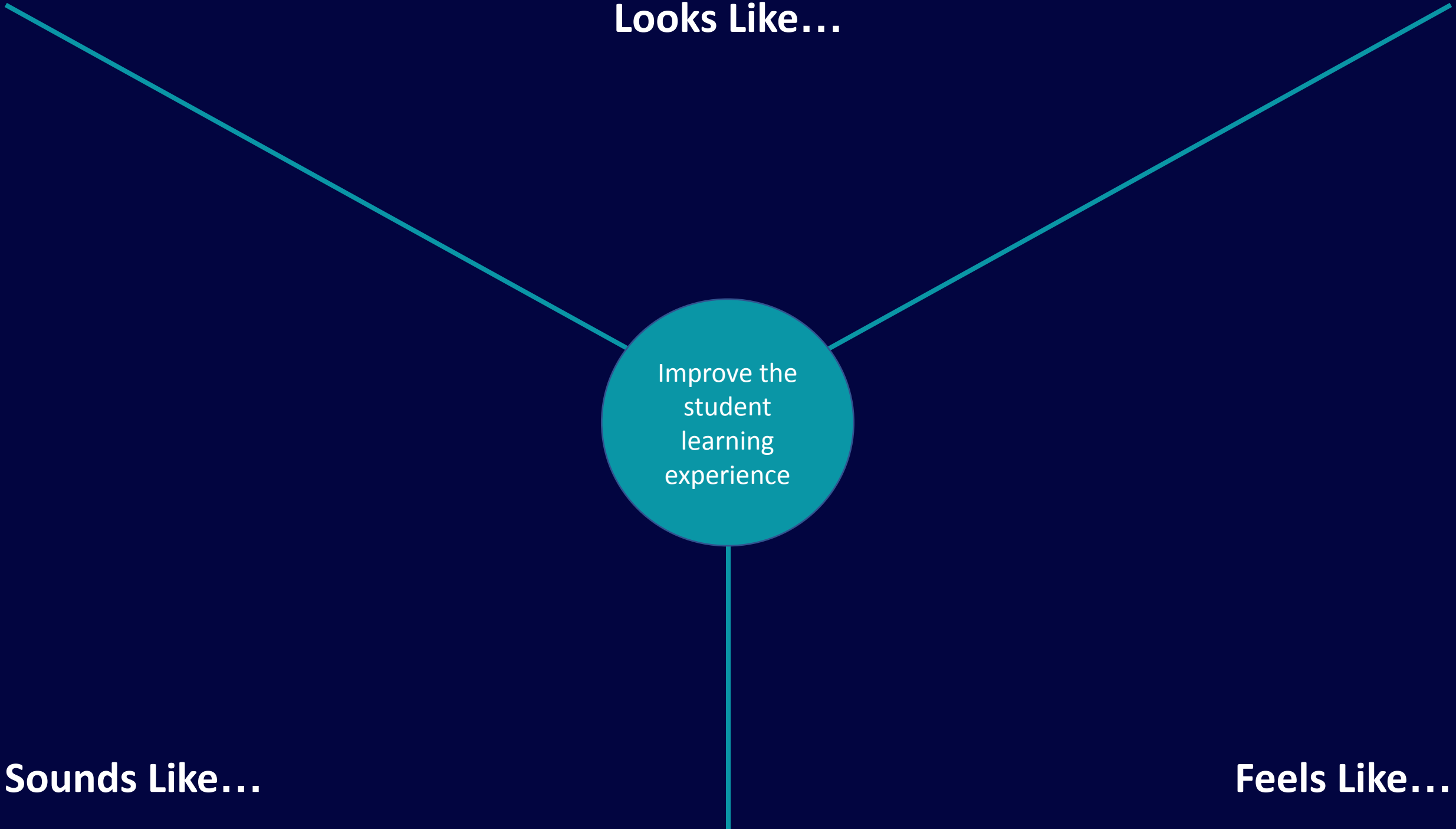
Improve the Student Learning Experience

**Looks Like...**

Improve the  
student  
learning  
experience

**Sounds Like...**

**Feels Like...**





# Looks Like...

## Classroom Observation Rubric

### Improvements in student learning experience

Students Smiling

Students on task

Students collaborating

Environment of engagement in learning

Students encouraging each other

Environment of respect for others

Students giving each other thoughtful feedback

End of Course Student Survey

Students asking questions

Environment of risk taking

# Sounds Like...

# Feels Like...

Unpacking Squishy Goals Exercise...

Become the Employer of Choice in the Market

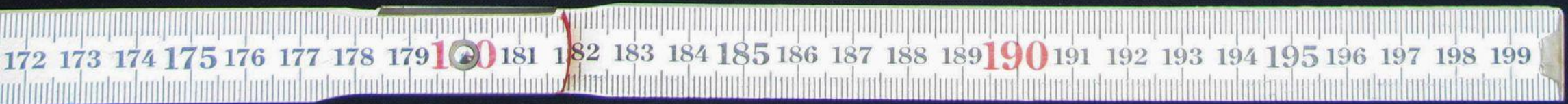
**Looks Like...**

Become the  
employer of  
choice in our  
market

**Sounds Like...**

**Feels Like...**





By unpacking the squish,  
which quantitative and  
qualitative metrics  
emerge?

How could they  
be gathered?



DEMO

# SWOT Analysis



**To Filter Data by Constituent Group:**  
Click on / off the constituent group to the right.

**To Filter Data by Theme or SWOT Quadrant**  
Click on a row (theme) or a column (SWOT Quadrant) in the table below. Clicking on an individual cell will filter by both criteria (theme x SWOT Quadrant).

<input checked="" type="checkbox"/> Filter by Constituent Group	# of Comments
<input checked="" type="checkbox"/> Faculty	25
<input checked="" type="checkbox"/> Students	8
<input checked="" type="checkbox"/> Trustee / Admin	6

Interactive

SWOT Quadrant	Comments
Strengths	Building a sense of community
Strengths	Building community, belonging
Strengths	Building maintaining relationships
Strengths	Building relationships
Strengths	Caring community members
Strengths	Close relationships between faculty and students
Strengths	Community
Strengths	Community and culture
Strengths	Community and our ability to move forward and change
Strengths	Community sense of character
Strengths	Connection to students
Strengths	Conveying a strong sense of community and unity
Strengths	Growing sense of community
Strengths	Inclusion and equality
Strengths	Informal environment that invites dissenting perspectives and challenges
Strengths	Loving, caring relationships
Strengths	Making everyone feel welcome
Strengths	Our devotion to uniqueness and community
Strengths	Our students are generally very accepting of each other
Strengths	People care a lot about kids
Strengths	Prioritization of belonging
Strengths	Prioritizing relationships
Strengths	Relationship with students and faculty

Clear Visual

Theme	Weaknesses	Threats	Strengths	Opportunities
Academics / Curricular Program	8	-	6	25
Admissions	1	3	-	1
Affordability	-	18	-	-
Athletics	-	-	5	1
Communication	10	-	-	-
<b>Community / Relationships</b>	2	3	<b>39</b>	3
Diversity, Equity, and Inclusion	19	5	1	8
	26	6	-	8
	3	4	2	2
	1	1	3	15
Mission-Purpose	13	7	5	12
Outside Trends	-	18	-	5
People	2	4	25	4
Reputation / Marketing	11	7	3	5
Student Experience	4	3	12	6
Well-Being	2	4	1	1
Willingness to Change	2	11	1	1

Analysis & Insights

# Bringing the Mission-Driven, Data-Informed Metrics Design Process to Your School

- 1) Where are you in the strategic planning or implementing accreditation recommendations?
- 2) Examine your current strategic goals or mission statement. Are there any squishy terms that should be unpacked to support shared understanding?
- 3) What data are you collecting and how are you tracking it?
- 4) Which metrics will help you measure progress towards goals?



[www.missionanddata.com](http://www.missionanddata.com)

**Anne-Marie Balzano, EdD**

[ambalzano@missionanddata.com](mailto:ambalzano@missionanddata.com)

**Mission & Data** is a firm dedicated to the effectiveness, health, and vitality of educational institutions and other organizations that make the world a better place. We are committed to enhancing mission-driven, data-informed leadership and governance by:

***Integrated strategy consulting*** to improve organizational effectiveness and facilitate organizational transformation.

***Developing custom data products***, visualizations, and dashboards to highlight progress, identify trends, and leverage actionable insights.

***Auditing current practice*** and analyzing organizational data to recommend process efficiencies and strategic improvements.

***Coaching leaders and boards of trustees*** to enact institutional vision and build a culture of inquiry-based decision making practices.

**Kelsey Vrooman**

@Kvroomedu

[kvrooman@missionanddata.com](mailto:kvrooman@missionanddata.com)