Performance Accountability System

The district has initiated an accountability system for its educational program. The system is tied to the budget and used to evaluate student progress on a quarterly basis. Measurable objectives, longer-range accountability measures, and more comprehensive reporting can improve the system. The district will make some of these improvements for the 2002-03 school year. However, it has not developed similar measures for its support programs. These measures help to ensure that the programs provide needed support in a cost-effective manner.

Conclusion

The Okaloosa County School District (the district) is in the process of developing accountability systems for its educational and support programs. This process began with the election of a new superintendent, who took office in January 2001. As a businessman, he was interested in developing accountability information that could be used to improve performance and cut costs.

The district began with developing an accountability system for its schools’ K-12 education programs for students expected to obtain regular diplomas. This system, which is documented in each school’s A+ plan, uses test scores to identify students who are not performing according to expectations. During the planning and budgeting process, each school targets the students it wants to focus on and then develops strategies for improving the performance of these students. These strategies and the funds needed to implement them become part of the school’s budget. During the course of the school year, the school uses quarterly test scores to assess the progress of the targeted students. If students are not progressing according to expectations, the schools develop individualize strategies to improve their performance.

Although this accountability system shows promise in that it is actively used to manage the district’s educational strategies, it needs improvement. During the next school year, the district intends to modify the system to include all students and to develop measurable objectives or benchmarks by which to judge performance both at the school and district level.

In addition to these planned improvements, the district should develop measures for longer-term outcomes such as drop-out rates and student performance in higher educational institutions. It also should report on the progress of special populations of students, such as exceptional students and students receiving free or reduced-price lunches.

The district has not yet developed similar accountability systems for its support programs. According to the superintendent, developing these systems will be a district priority during the next few years, and the district is beginning to gather baseline data for its food service and maintenance programs.

During the course of this review, OPPAGA noted a number of district accomplishments in the performance accountability system, some of which are included in Exhibit 4-1 below.
The District Has Had a Number of Notable Accomplishments in Performance Accountability Systems in the Last Three Years

- The district has developed a promising accountability system that it uses to evaluate, manage, and continually improve its educational programs for students expected to obtain regular diplomas.
- The district has tied student performance to school budgets.
- The district uses performance information in its evaluation of principals and teachers.
- The district uses evaluative information to improve its performance.
- The district uses a number of mechanisms, including brochures and its website, to report performance information about its education program to parents and community members.

Source: Okaloosa County School District.

Overview of Chapter Findings

OPPAGA staff reviewed the district’s performance accountability system using the Best Financial Management Practices adopted by the Commissioner of Education and associated indicators. The best practices team employed several methodologies to develop chapter conclusions and action plans. These included review of district self-assessments and supporting documentation, interviews with district managers, and focus groups with teachers and principals. We also reviewed school budgets and A+ plans and gathered documentation for how student performance indicators are used to evaluate schools, principals, and teachers.

Fieldwork was concluded in July 2002. Any subsequent district action is not reported in this report, but will be presented in a follow-up review.

An overview of chapter findings is presented below.

Accountability of Programs

1. The district has broad goals for improving student performance, district management, and customer relations. However, it has not developed measurable objectives that can be used to judge its performance in achieving these goals. (Page 4-3)
2. The district has appropriate performance measures to manage and evaluate most of its educational programs. However, it does not have performance measures for its support programs. (Page 4-6)
3. The district regularly assesses the performance of its educational programs and employs alternative strategies when performance does not meet expectations. Without accountability systems for support programs, the district bases decisions to use alternative service strategies, such as outsourcing, on other factors. (Page 4-7)
4. The district evaluates its programs and activities and uses evaluation results to improve program performance and cost-efficiency. (Page 4-8)
5. The district reports the performance of its basic educational programs, but it does not report the performance of other programs such as ESE and ESOL. (Page 4-10)
Fiscal Impact of Recommendations

The fiscal impact of recommendations in this chapter is included in the fiscal impact for recommendations Action Plans 3-5 and 3-6 in Chapter 3, Management Structures.

Background

In 2001, the Okaloosa County School System developed a new accountability system for its basic education programs in 2001. Under this system, each school’s budget contains baseline data on its past performance, the revenues the school is expected to generate from its FTEs, and how it will use those revenues to improve performance. The area assistant superintendents, chief quality assurance and curriculum support officer, chief financial officer, superintendent, and school board must approve each school’s proposed budget. Area assistant superintendents and the chief financial officer monitor school performance in achieving desired outcomes and staying within budget during the school year. If this monitoring indicates that the school is not progressing as expected, the school must develop a corrective action plan.

Although the district relies strongly on principals to identify and implement strategies to improve performance, it is beginning to provide them with tools they need to succeed. For example, the district recently has trained all principals on how to disaggregate and analyze data on student performance. It also has provided them ready access to student performance data.

Accountability of Programs

1 The district has broad goals for improving student performance, district management, and customer relations. However, it has not developed measurable objectives that can be used to judge its performance in achieving these goals.

The Okaloosa County School District developed three district-wide goals: better student performance, better management, and better customer relations. It has not developed measurable objectives for these overall goals; however, on its website, it reports its performance in achieving these goals in the following manner. (See Exhibit 4-1)

Exhibit 4-1

Absent Measurable Objectives, the District Uses Descriptive Information to Report its Performance in Achieving District-wide Goals to the General Public

Better Student Performance

“This year nearly every grade in every school is doing better in reading, writing, and mathematics. Our schools earned $1.4 million in state performance bonuses. Every school has a plan to achieve the state's highest academic rating.”
The district has not established measurable objectives for its education program

The district’s primary goal for its educational programs is better student performance. The district measures its progress in improving student performance primarily through test scores, particularly the Florida Comprehensive Assessment Test (FCAT) scores. These scores are used throughout Florida to measure the success of K-12 education programs. In addition, the district tracks school attendance and readiness-for-college rates.

The past year’s FCAT scores for each school are shown in its A+ Plan and budget, each of which contains the number and percentage of the school’s students who scored above and below expectations on the FCAT tests for reading, writing, and math in the previous fiscal year. School budgets also show their past year’s attendance rates, and high school budgets contain their past year’s readiness-for-college rates. Although this baseline information can be used to chart the schools’ performance in improving student performance, not all schools have set measurable objectives or standards for the improvement they expect to achieve during the current school year. In addition, the district has not developed a districtwide objective for the gains it expects to achieve in student performance. Without this information, the district may not be able to objectively determine whether school or district progress meets expectations.

Currently the district’s accountability system focuses on students who are expected to obtain regular diplomas. It has not established measurable objectives for its students who are expected to obtain special diplomas; nor has it developed objectives for other indicators of school performance, including attendance rates, graduation rates, and post-graduation measures, such as employment or remediation rates.

During the next year, the district intends to improve its accountability system for educational programs. A presentation to school administrators indicates that each school is to set objectives for student performance in reading, writing, and mathematics in its A+ Plan for the 2002-03 fiscal year. The objectives are to be specific, measurable, attainable, research-based, and time-phased.

Schools are to tie these objectives to district and state objectives and the desired results of their school advisory committees. The district has not yet established district-wide measurable objects for its educational program, but intends to do so. This objective will be included in school A+ Plans. In addition, the plans are to specify the strategies schools will employ to achieve their objectives, the target group of students to whom these strategies apply, and the funds schools will use to implement the strategies. Schools are also being instructed to include in their A+ Plans a description of the actions they will take to provide training to their teachers and improve customer relations. However, the draft plans do not specify the outcomes schools expect to achieve by implementing these strategies.

The district has not established measurable objectives for its support programs

The district’s general goals of better management and improved customer satisfaction apply to its support programs, such as the personnel, student transportation, safety and security, food services, construction, and maintenance programs. However, it has not developed measurable objectives for these programs. This limits its ability to judge the their performance.
Performance Accountability System

Recommendations

- We recommend that the district continue its efforts develop an accountability system that includes measurable goals and objectives for all of its educational programs. In addition, it should develop goals, objectives, performance measures and measurable objectives for its support programs. This accountability system development process should be a part of the district’s strategic planning efforts.

- To improve its ability to assess the effect of its educational programs, we recommend that the district develop more long-term objectives for its educational program. These could include:
  - the percentage of students dropping out of school;
  - the percentage of those going to college who need remediation;
  - and the percentage of those not going to college who are employed.

Action Plan 4-1 provides the steps needed to implement this recommendation.

Recommendations for specific objectives pertaining to support programs are included in the chapters for those programs.

Action Plan 4-1

<table>
<thead>
<tr>
<th>Develop an Accountability Systems for All Educational and Support Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strategy</strong></td>
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<tr>
<td><strong>Action Needed</strong></td>
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<tr>
<td>Step 1:</td>
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<td>Step 2:</td>
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<td>Step 3:</td>
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<td>Step 6:</td>
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<td>Step 7:</td>
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<td>Step 8:</td>
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**Who Is Responsible** | Superintendent |
<table>
<thead>
<tr>
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<tbody>
<tr>
<td><strong>Time Frame</strong></td>
<td>December 2003</td>
</tr>
<tr>
<td><strong>Fiscal Impact</strong></td>
<td>Included in the fiscal impact of Action Plan 3-5 and 3-6.</td>
</tr>
</tbody>
</table>

Source: OPPAGA.
The district has appropriate performance measures to manage and evaluate most of its educational programs. However, it does not have performance measures for its support programs.

The district uses performance measures to evaluate and manage most of its educational programs. The district uses three measures to evaluate the success of its K-12 educational programs: FCAT test scores, attendance rates, and readiness-for-college rates. Performance data for these three measures are included in each school’s budget document. Each school receives approximately 90% of the funds generated by its student population for educational programs from local, state, and federal sources. Schools are expected to use these funds to increase the percentage of their students with acceptable FCAT scores. To accomplish this, each school develops a strategy for using budgeted funds to operate the school and improve the performance of a targeted population of students. Currently most schools have targeted students whose past performance places them in the school’s lowest quartile. However, according to district staff, during the next budget cycle, the schools’ targeted population will be expanded to include all students expected to obtain regular diplomas.

Because FCAT scores are not available until the end of the school year, each school uses one or more normed instruments to gauge the progress of its targeted students during the school year. Schools administer these tests at the beginning of the school year and at eight-week intervals. If one of the targeted students fails to meet performance expectations, the assistant area superintendents and principals work with the student’s teacher to develop an individualized plan for increasing that student’s performance. The district also uses student performance information to evaluate the performance of individual principals and teachers.

The district maintains normed test and FCAT scores for all targeted students who are expected to obtain regular diplomas. Principals or quality assurance staff can use this data to gauge the performance of special sub-populations of students, such as non-English speaking (ESOL) or exceptional student education (ESE) students. However, the district does not maintain other indicators that can help evaluate these programs, such as the percentage of ESE students who receive services in a timely manner. The district also does not aggregate performance information for special education students who are not expected to obtain regular diplomas. These types of indicators can help the district to ensure that its special education programs are performing well.

Although test score and attendance measures are reasonable indicators of the district’s progress in achieving its short-term goals, they fall short of measuring progress in achieving longer-term goals, such as adequately preparing them for higher education or work. By tracking its performance on higher-level measures, the district can determine how well high test scores and attendance rates correlate with more long-term outcomes.

The district also has developed accountability measures for its applied technology center. These measures and standards and performance data for Fiscal Year 1999-2000 are included in the center’s 2001-02 budget. Although many of the technology center’s measure are interim outcome or process measures, it does have one true outcome measure—the percentage of program completers who are employed in their respective trades. However, the district has not developed a measure of the wages these employed program completers receive.

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1 Only high schools report readiness for college rates graduation rates for their college-bound students.
2 Schools can select their own instruments but their area assistant superintendent and the chief quality assurance and curriculum support officer must approve their selection.
The district does not have performance measures for its support programs

With the exception of construction services, the district has not developed and used performance to manage its support programs. The district has developed performance measures that it uses to assess the services it receives from its contracted construction management company, and these measures are discussed in detail in Chapter 9. It also reports some student transportation data to the Department of Education; however, it does not use this data to make decisions on how to manage the transportation program. (See Chapter 12, page 57).

Because it does not collect or use performance data, the district cannot effectively evaluate the efficiency and effectiveness of its support services. According to the superintendent, the district intends to develop performance measures and collect data for all of its support programs. For example, district staff is beginning to implement systems to collect timeliness and cost data on its maintenance and food service programs. However, when the superintendent took office in January 2001, he gave highest priority to developing a performance accountability system and collecting data to manage the district’s educational program. Once the accountability systems for those programs are complete and in use, the district will begin to develop similar systems for its support programs.

Recommendations

- The district should improve its performance measurement system for its educational programs for students who are expected to receive regular diplomas, expanding it to include all students by adding some long-term measures on student outcomes such as employment rates and developing some process measures to allow it to better monitor services to special groups of students such as ESE students. The district should also develop performance accountability systems for all of its support programs and use them in managing the programs.

The steps needed to implement this recommendation are included in Action Plan 4-1.

3 The district regularly assesses the performance of its educational programs and employs alternative strategies when performance does not meet expectations. Without accountability systems for support programs, the district bases decisions to use alternative service strategies, such as outsourcing, on other factors.

As discussed on page 4-5, the district uses performance data to regularly assess the performance of its education programs for targeted students who are expected to obtain regular diplomas. When a targeted student’s performance does not meet expectations, the district develops alternative educational strategies for that student. The board uses each school’s past performance of FCAT scores, attendance rates, and dropout rates as benchmarks and will compare current performance to those benchmarks. It does not formally compare its performance to that of peer districts; however, the superintendent and board members were aware of how the district performed in relationship to other Florida districts.

Although the district uses performance information to manage its educational programs, it has not used them to make decisions about whether to outsource these programs. However, the district would be unlikely to outsource these programs because education is its main business line.
The district has not developed performance measures for its support programs; therefore, it has not used performance information to make decisions about outsourcing these programs. Instead, it has used information about its capacity to perform the work needed to carry out the program. For example, when the district obtained the penny sales tax for school construction, it planned to implement a short-term construction program that would meet its construction needs for the foreseeable future. Instead of hiring the permanent staff to carry out this construction program, the district contracted out the work to a qualified construction management firm.  (See Chapter 10.)

However, as previously discussed, the district is planning to develop performance accountability systems for its other programs and to use accountability information to make decisions about these programs. The district could also use accountability information to assess the efficiency and effectiveness of its support programs by benchmarking it against the performance of other, similar districts.

**Recommendations**

- The district should develop performance information for all of its programs and use this information to make management decisions, including outsourcing decisions.

Action Plan 4-1 provides the steps needed to implement this recommendation.

**4** The district evaluates its programs and activities and uses evaluation results to improve program performance and cost-efficiency.

The district uses a number of different techniques to evaluate the performance and cost of its educational and support programs. These include ongoing, formative evaluations of its educational programs for students who are expected to obtain regular high school diplomas, periodic summative evaluation of particular instructional techniques, and periodic process evaluations of other programs and activities. It uses the results of its evaluations to improve program efficiency and effectiveness.

**Evaluation for Educational Programs**

The district uses test scores to conduct ongoing, formative evaluations of its educational programs for students expected to obtain regular high school diplomas. As previously described, each school regularly administers normed tests to its students and uses the results to determine whether new strategies are needed to improve that student’s performance. Thus, the district is constantly evaluating the results of its educational programs on student performance and taking steps to change its instructional strategies to meet the needs of individual students.

To help teachers select appropriate instructional strategies, the district has entered into a contract for evaluation services with the University of West Florida. The district uses these evaluation resources to conduct in-depth studies of the effectiveness of a variety of educational or support strategies, including the use of educational software, counseling services, etc. According to the district’s quality control and curriculum support officer, the district selects the topics of these evaluations in part by looking at instructional strategies that are becoming popular with teachers and therefore could represent a significant future investment for the district. In addition, these evaluations may be triggered by concerns that a particular strategy is not working effectively.
The results of these evaluations are disseminated to schools when they select the educational strategies they intend to use to improve performance. The Office of Quality Control and Curriculum Support reviews each school’s proposed strategies and may make suggestions for changes based on the evaluation information it has received. However, according to school principals and teacher focus groups, they need more information on the effectiveness of various educational strategies. They also need better information on how well the normed tests they administer correlate with FCAT scores.

The University of West Florida also summarizes and reports back on an annual survey the district conducts of pupils, parents, and community members. District schools disseminate these surveys to all interested parties once a year. However, low response rates and a poorly designed survey instrument have limited the usefulness of these surveys. To address these concerns, the superintendent has recently directed district staff to develop a new survey instrument.

Other Evaluations

The district also performs other evaluations at the direction of the board or superintendent. Many of these are process evaluations done in response to concerns about a program or process. District staff or specially-appointed committees generally perform these evaluations. In addition, the evaluation may include participation by outside experts such as staff from the Department of Education. The evaluations generally result in written reports with recommendations to improve district operations. Examples of these evaluations are described below.

- An evaluation by district and DOE staff of the exceptional educational program. This evaluation addressed issues raised by the parents of ESE students, including transportation, preparation of individual education plans, and communication between schools and parents. The evaluation resulted in the decentralization of ESE specialists, a study of the location of ESE programs, and increased emphasis on communication between district staff and ESE parents.

- An evaluation of paperwork requirements by a committee by district staff. The evaluation analyzed teacher paperwork requirements, the source of the requirements, and the content of each required report. It resulted in the elimination of some and streamlining of other paperwork requirements.

- An evaluation of the routes of school buses performed by transportation staff. This evaluation looked at routing safety and resulted in the elimination of many bus stops on Highway 98, a busy roadway that had been the site of previous accidents involving school buses, and the elimination of unnecessary bus stops.

Currently, the district is in the process of developing information that can be used to evaluate and improve the efficiency and effectiveness of its food service and maintenance programs.

However, the district can improve its evaluation process by developing more systematic methods for determining which programs and functions would most benefit from an evaluation. These methods could include developing performance measures for all district programs and focusing evaluation resources on programs that are not meeting expectations or on unproven, high-cost strategies. It also could improve its customer survey to better elicit instances in which students, parents, or other interest groups have problems with district services.

**Recommendations**

- *We recommend that the district develop a more systematic method for disseminating the results of evaluations of educational strategies to teachers and principals.*
We also recommend that the district improve its methods for selecting evaluation topics by using performance indicators and survey results to identify areas of highest concern.

Action Plans 4-2 and 4-3 provide the steps needed to implement this recommendation.

**Action Plan 4-2**

**Disseminate the Results of Evaluations of Instructional Strategies**

<table>
<thead>
<tr>
<th>Strategy</th>
<th>The district should develop a more systematic method for disseminating the results of its evaluations of educational strategies to teachers and principals.</th>
</tr>
</thead>
</table>
| Action Needed | Step 1: The area assistant superintendents should periodically meet with principals to discuss which educational strategies appear to be effective and which do not. Principal should then disseminate this information to teachers.  
Step 2: The district should publish the results of its evaluations of instructional strategies on its intranet site.  
Step 3: The quality control and curriculum officer should routinely discuss evaluation findings with the area assistant superintendents. |
| Who is Responsible | The area superintendents, quality control and curriculum officer, and chief information management officer. |
| Time Frame | November 2002 |
| Fiscal Impact | This can be accomplished with existing resources. |

Source: OPPAGA.

**Action Plan 4-3**

**Use Performance Measures and Customer Surveys to Improve Selection of Research Topics**

<table>
<thead>
<tr>
<th>Strategy</th>
<th>The district should develop a more systematic method for identifying programs or activities in need of evaluation by using performance measures and customer surveys to identify areas in need of improvement.</th>
</tr>
</thead>
</table>
| Action Needed | Step 1: After it develops an accountability system for all of its programs, the district should use performance measures to identify activities and programs that are not meeting expectations and focus its evaluation resources on those activities and programs.  
Step 2: After it improves its customer satisfaction survey, the district should use the survey results to determine which programs and activities would most benefit from an evaluation. |
| Who is Responsible | The school board and superintendent |
| Time Frame | December 2003 |
| Fiscal Impact | This can be accomplished with existing resources. |

Source: OPPAGA.

5 The district reports the performance of its basic educational programs, but it does not report the performance of other programs such as ESE and ESOL.

The district reports the performance of its school’s basic education programs through informational pamphlets, school budgets, and its website. Currently the school budgets contain information on the
number and percentage of its students performing at or above a satisfactory level in math, reading, and writing and the average percentage of students who attend class daily. In addition, high schools report the number of their students who are seeking college degrees and, of those, the number who are considered to be ready for college in reading and math. The school board reviews and approves these budgets.

Since this means of budgeting is in its first year of implementation, it is not clear how school performance will be reported to the board in the next fiscal year. However, next year’s budget documents should contain information about each school’s performance in the most current year as well as its performance in the prior year. This would allow board members to see how much progress schools are making in improving student performance.

In addition, the district’s website lists each school’s average FCAT scores in reading, math, and writing, and compares them to the average scores for all students in the Okaloosa County School District and in Florida public schools. Parents can easily access this information to determine how well their school’s performance compares with other schools in the district, the district average, and the state average. However, they cannot use this information to determine whether their school has improved its performance and how much improvement has been made.

Information about school performance is also published in the local newspaper. For example, in September 2001, the Northwest Florida Daily News reported that 25 of the district’s 37 schools earned an A letter grade in the state’s school ranking system. According to district staff, the Northwest Florida Daily News also routinely reports the results of FCAT tests.

However, parents and other stakeholders do not routinely receive information on how special groups of students, such as ESE and ESOL students, are performing, and how the performance of these students compares with that of basic students. As required by law, the district submits to the Department of Education a detailed report on the performance of its ESE students, and district staff present information from this report to the board. But the district does not otherwise report this information. The district appropriately expects special groups of students seeking regular diplomas to perform at the same level as basic students; however, these students face special challenges and the district receives more resources with which to serve them. To be accountable for the services it provides for these students, the district needs disaggregate their performance data from that of regular students. Since the number of special students attending any one school can be low, the district should present performance information about these students on a district-wide basis.

Since the district has not developed accountability systems for its support programs, it does not report on the performance of these programs to the board or public. However, it does publish school bus route and school lunch information on its web page.

**Recommendations**

- *Once the district develops accountability information on its support systems, it should provide this information to the board members and, if deemed necessary, to the public.*

Action Plan 4-4 provides the steps needed to implement this recommendation.

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3 As measured by FCAT scores.
### Accountability Information Should be Better Reported to the Public

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Report accountability information for support programs to the board and public.</th>
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<tbody>
<tr>
<td><strong>Action Needed</strong></td>
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<tr>
<td>Step 1:</td>
<td>The district should annually report should report on the performance of special</td>
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<td>groups of students, such as ESE, ESOL, and at-risk students to both the board</td>
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<td>and the general public. Because these groups may comprise relatively small</td>
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<td>numbers of children at the school level, the district may want to report this</td>
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<td>information districtwide.</td>
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<tr>
<td>Step 2:</td>
<td>After it develops accountability measures for its support programs, the district</td>
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<td>should report this information in the budget document that is approved by the</td>
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<td>boards.</td>
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<td>Step 3:</td>
<td>The district should consider reporting performance data for special groups of</td>
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<tr>
<td></td>
<td>students and support programs on its website. This information would be</td>
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<td></td>
<td>most helpful if the district included comparative information on basic students</td>
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<td></td>
<td>or from similar programs in other districts.</td>
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<tr>
<td><strong>Who is Responsible</strong></td>
<td>The superintendent</td>
</tr>
<tr>
<td><strong>Time Frame</strong></td>
<td>March 2003</td>
</tr>
<tr>
<td><strong>Fiscal Impact</strong></td>
<td>This can be implemented with current resources.</td>
</tr>
</tbody>
</table>

Source: OPPAGA.