# PEWAUKEE SCHOOL DISTRICT

# 2009 FEEDBACK REPORT

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# Wisconsin Forward Award Feedback Report for Pewaukee School District

## Introduction

The Wisconsin Forward Award Board of Examiners has evaluated your organization's application report for Wisconsin Forward Award assessment and recognition. This feedback report contains background information on the evaluation and scoring process, as well as the findings of the Examiner Team that reviewed your organization's application. The findings include an Executive Summary of overall findings, as well as detail by Category Item of your organization's strengths and opportunities for improvement relative to the Criteria for Performance Excellence.

## Preparing to Read Your Feedback Report

*Your feedback report contains Wisconsin Forward Award Examiners' observations that are based on their understanding of your organization. The Examiner Team has provided comments on your organization's strengths and opportunities for improvement relative to the Baldrige Criteria for Performance Excellence. The feedback is non-prescriptive. It will tell you where Examiners think you have strengths to celebrate and where they think that improvement opportunities exist. The feedback will not say specifically* ***how*** *you should address these opportunities. The specifics will depend on what you decide is most important to your organization.*

*Applicant organizations read and use feedback comments in different ways. We and the Baldrige National Quality Program suggest the following practices for your consideration:*

- Take a deep breath and approach your Wisconsin Forward Award feedback with an open mind. You applied to get the feedback. Read it, take the time to digest it, and read it again.
- You know your organization in ways in which the Examiner team can't. There might be relevant information that was not communicated to them or that they did not fully understand. Although we strive for the best and most relevant feedback at all times, we do not achieve it in every comment. If Examiners have misread your application or misunderstood your organization on a particular point, don't discount the entire feedback report. Consider the other comments and focus on the most important ones.
- Use your strength comments to understand what the Examiners observed you do well. Continue to sustain, evaluate, and improve the things you do well and build on them to achieve world-class performance and a competitive advantage. Sharing those things you do well with the rest of your organization can speed organizational learning. Celebrate your strengths. You've worked hard and should congratulate yourselves.
- Prioritize your opportunities for improvement. You can't do everything at once. Think about what's most important for your organization at this time and decide which things to work on first. You may decide to address all, some, or none of the opportunities for a particular Item. It depends on how important you think any one particular Item or comment is to your organization.
- Use the feedback as input to your strategic planning process. Focus on the strengths and opportunities for improvement that have an impact on your strategic goals and objectives.
- If WFA can provide additional support of guidance as you progress in your performance excellence journey, please do not hesitate to contact us at (608) 663-5300 or info@forwardaward.org.

## Executive Summary

Based on the Wisconsin Forward Award Board of Examiners' review of the organization's written application and site visit review Pewaukee School District scored in

- **Band 7** in process Items (Categories 1–6)
- **Band 3** in results Items (Category 7)
- **Band 5** overall

This assessment places the organization at the **Mastery** recognition level. For an explanation of the scoring bands, please refer to Figure 4, "Scoring Band Descriptors," on page 49 of this document.

### Key Strengths/Outstanding Practices

- Pewaukee School District (PSD) has created and continues to nurture a strong collaborative culture focused on creating life chances for children. It leverages its unique all-campus setting to foster citizenship and employee engagement and partner with its community. Using risk-taking and innovation, the organization focuses on the future and creates an early-childhood through 12th grade (EC-12) organization that expects excellence at all levels to bring its mission to life.
- PSD uses a variety of listening and learning methods to collaborate, innovate, and respond to the needs of its students, parents, and community. It has a sophisticated infrastructure allowing for immediate communication via its website, email, and phone as well as printed messages to all stakeholders. Its unique all-campus setting allows for a great deal of face-to-face communication, creating a positive feeling of family among all who work and learn there from administrators to staff, students, parents, and its community.
- Technology is integrated throughout the entire organization and provides a solid platform from which all involved are allowed to focus on providing the highest quality education possible to every learner. It also provides efficient ways for the entire district and its stakeholders to understand the current state, plan for future states, and understand whether goals have been achieved.
- The district has developed and refined a comprehensive, systematic strategic planning process that focuses on continuous improvement as a way of life that resonates not only with students and teachers, but also with all stakeholders. The process involves all stakeholders and is mission- and data-driven with the ultimate end goal being excellence in student achievement.
- By honoring, listening to, and engaging its people, PSD's visionary leadership team inspires innovation that facilitates the opportunity for academic excellence for all students. The district operates with a unified voice that models citizenship and promotes a culture of trust, risk-taking, and change for improvement. Its improvement process, focused at a strategic level, has demonstrated the organization's ability to rapidly deploy initiatives that quickly permeate through the entire district, including to students.

### Significant Improvement Opportunities for Process Items

- The district relies heavily on informal approaches for sharing information. There are disconnects between what leaders know and what all other areas of the organization know as well as disconnects between buildings, teachers, and non-faculty staff. The unique all-campus setting allows for efficient organizational knowledge sharing; however, there is rich body of organizational knowledge, especially best practices, that is not being consistently shared among all groups, potentially resulting in duplication of efforts or critical needs being missed.

- Although PSD has strong approaches to most key areas regarding education and learning, these approaches are not consistently deployed, nor are they fully deployed in non-educative processes. This can result in the inability to respond appropriately and effectively to future challenges as a growing organization and community in an economically stressed environment.

## Significant Strengths for Results

- In a competitive environment that reflects high achieving educational outcomes and has high expectations, the district enjoys strong performance, particularly in student achievement scores, community support and financial measures.
- PSD has access to and uses data and information regarding educational outcomes to help achieve excellence in education. Information is used on a granular level to understand and address individual student needs through active intervention pathways for both underachieving and overachieving students on a weekly basis and on a teacher level to make instructional adjustments. Additionally, information is used on a grade, building, and district-wide level to understand and address trends in educational programming and community needs.

## Significant Improvement Opportunities for Results

- PSD does not consistently collect and use comparative and comparable data to assess its own performance in a highly competitive environment. Although immediately comparable data may not be easily available or provide an exact match to the district's own data collection, comparable data can provide lessons and insights for stretch opportunities.
- Results are relatively lacking in areas that are not directly associated with educational outcomes and satisfaction. For example, the district indicates that one of the top three reasons students come to the district is their ability to participate in athletic and non-athletic extracurricular activities, but surveys for satisfaction in athletics is passive and relatively non-existent for non-athletic extracurricular activities. The district has been able to achieve significant performance improvements in student achievement due to its focus on achievement and satisfaction scores during the strategic planning process and may be able to similarly maintain its status as district of choice for student participation in non-educational activities but faces the threat of families moving to larger nearby school districts for these opportunities. The organization also reports few workforce-related outcomes.
- Overall, more comprehensive and better segmented results may assist PSD in assessing its performance.

## Details of Strengths and Opportunities for Improvement

# 1.0 Leadership

Your overall score in this Category is in the **70–85** percentage range. Refer to Figure 2, "Criteria Scoring Guidelines (Process)," on page 46.

### 1.1 Senior Leadership

Your score in this Item is in the **70–85** percentage range.

*Strengths:*

| Item reference | Description |
|---|---|
| 1.1a(1) | **Senior Leaders translate organizational vision and values into goals, strategies and action plans through the annual strategic planning process. Pewaukee School District's (PSD) vision and values are rewritten every five years and are reviewed annually to build the foundation for the strategic plan. The mission, vision and values are deployed to stakeholders on a daily, weekly, monthly, quarterly, and annual basis through a variety of means (Figure 1.1-3).** |
| 1.1a(3) | Senior leaders have a visionary approach to organizational sustainability and performance improvement. Initiatives to ensure sustainability include a commitment to economic stability, sustainability of the campus setting, improved teacher recruitment, selection, retention, and induction programs, a safety committee that reviews policy and procedures, and a commitment to the continuous improvement plan process. Administrative succession plans have been developed and are in early stages of implementation. |
| 1.1b(1) | Senior leaders communicate with and engage the entire workforce through a variety of methods, including face to face communication, staff meetings, and newsletters. Complaint resolution is first attempted at the lowest level (starting with the classroom level). Board of Education members take an active role in welcoming new teachers and celebrating excellence by holding Spotlight on Learning or Spotlight on Teaching at each Board meeting. Students are recognized in multiple ways for citizenship participation and academic success. The communication plan is updated annually as part of the strategic planning process and is aligned with core competencies. |

*Opportunities for Improvement:*

| Item reference | Description |
|---|---|
| 1.1a(3) | Although succession planning and development of future leaders takes place, there is not a fully deployed systematic process for senior leaders to identify and validate leader candidates. Without a fully deployed systematic approach, PSD could fail to meet the demands of its growing stakeholder base. |

## Item 1.1 Evaluation Factor Score Summary

| Factor | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| **Approach** | No systematic approach to Item requirements is evident; information is anecdotal. | The beginning of a systematic approach to the basic requirements of the Item is evident. | An effective, systematic approach, responsive to the basic requirements of the Item, is evident. | An effective, systematic approach, responsive to the overall requirements of the Item, is evident. | An effective, systematic approach, responsive to the multiple requirements of the Item, is evident. | An effective, systematic approach, fully responsive to the multiple requirements of the Item, is evident. |
| | | | | | X | |
| **Deployment** | Little or no deployment of any systematic approach is evident. | The approach is in the early stages of deployment in most areas or work units, inhibiting progress in achieving the basic requirements of the Item. | The approach is deployed, although some areas or work units are in early stages of deployment. | The approach is well deployed, although deployment may vary in some areas or work units. | The approach is well deployed, with no significant gaps. | The approach is fully deployed without significant weaknesses or gaps in any areas or work units. |
| | | | | | X | |
| **Learning** | An improvement orientation is not evident; improvement is achieved through reacting to problems. | Early stages of a transition from reacting to problems to a general improvement orientation are evident. | The beginning of a systematic approach to evaluation and improvement of key processes is evident. | A fact-based, systematic evaluation and improvement process and some organizational learning, including innovation, are in place for improving the efficiency and effectiveness of key processes. | Fact-based, systematic evaluation and improvement and organizational learning, including innovation, are key management tools; there is clear evidence of refinement as a result of organizational-level analysis and sharing. | Fact-based, systematic evaluation and improvement and organizational learning through innovation are key organization-wide tools; refinement and innovation, backed by analysis and sharing, are evident throughout the organization. |
| | | | | | X | |
| **Integration** | No organizational alignment is evident; individual areas or work units operate independently. | The approach is aligned with other areas or work units largely through joint problem solving. | The approach is in the early stages of alignment with basic organizational needs identified in response to the Organizational Profile and other process Items. | The approach is aligned with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is integrated with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is well integrated with organizational needs identified in response to the Organizational Profile and other Process Items. |
| | | | | X | | |

The overall score is not intended to be a numerical average of the elements above; rather the overall range and score is one which the Examiner team felt was the most descriptive of the organization's achievement level for this Item.

| Item 1.1 Overall Scoring Range | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| | | | | | X | |

## 1.2 Governance and Social Responsibilities

Your score in this Item is in the **70–85** percentage range.

*Strengths:*

| Item reference | Description |
|---|---|
| 1.2a(1) | **PSD reviews and achieves management accountability by fostering decision making, annual evaluation, and reporting and defining contract language; fiscal accountability through proactive budgeting and cost containment done in a spirit of stewardship; and transparency through frequent and complete communication; and protection of stakeholder interests through fiscal and ethical responsibility. These approaches are integrated with strategic objectives and aligned with the district's mission. There are clearly defined student expectations and a commitment to obtaining stakeholder feedback.** |
| 1.2a(2) | The annual review process for employees and senior leaders, the Cabinet and the Board of Education is aligned with strategic challenges and the organization's mission to provide academic excellence. Senior leaders attend workshops and conferences in addition to internal professional development to develop skills. Evaluations are based on criteria for effective school leadership including student performance. A new process to evaluate the Superintendent is in early stages of implementation. |
| 1.2b(1) | The district promotes legal and ethical behavior and social responsibility through its focus on promoting positive citizenship. Annual parent, student, and teacher surveys, which are integrated with the overall mission, solicit improvement strategies. PSD also proactively addresses campus safety and has a comprehensive crisis management plan in place. The Superintendent and Administrative Team review all regulatory, legal, and accreditation requirements. |
| 1.2b(2) | **The district acknowledges that citizenship and community partnership is key to strategic planning, models citizenship to its students, and expects good citizenship behavior from them. The Board of Education implements policies and regulations distributed to all schools, students, and stakeholders. The organization provides training programs to promote ethical behavior. All employees receive clear communication and contract language with added emphasis on ethical behavior expectations provided in new employee orientation.** |

*Opportunities for Improvement:*

| Item reference | Description |
|---|---|
| 1.2a(2) | Other than evaluating progress on Board of Education annual goals, evaluation of individual Board members does not occur. Individual feedback to Board members may strengthen leadership qualities needing improvement. Consistent performance reviews and feedback may enable the organization to more fully monitor the effectiveness of the Board and leadership system overall. |
| 1.2b(2) | Although standards of ethical behavior are established and clearly communicated, a fully deployed systematic reporting and monitoring process is not in place. Failure to encourage reporting and require monitoring of potential breaches could result in loss of stakeholder trust and have potentially negative impacts on citizenship and community partnerships. |

## Item 1.2 Evaluation Factor Score Summary

| Factor | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| **Approach** | No systematic approach to Item requirements is evident; information is anecdotal. | The beginning of a systematic approach to the basic requirements of the Item is evident. | An effective, systematic approach, responsive to the basic requirements of the Item, is evident. | An effective, systematic approach, responsive to the overall requirements of the Item, is evident. | An effective, systematic approach, responsive to the multiple requirements of the Item, is evident. | An effective, systematic approach, fully responsive to the multiple requirements of the Item, is evident. |
| | | | | | | X |
| **Deployment** | Little or no deployment of any systematic approach is evident. | The approach is in the early stages of deployment in most areas or work units, inhibiting progress in achieving the basic requirements of the Item. | The approach is deployed, although some areas or work units are in early stages of deployment. | The approach is well deployed, although deployment may vary in some areas or work units. | The approach is well deployed, with no significant gaps. | The approach is fully deployed without significant weaknesses or gaps in any areas or work units. |
| | | | | X | | |
| **Learning** | An improvement orientation is not evident; improvement is achieved through reacting to problems. | Early stages of a transition from reacting to problems to a general improvement orientation are evident. | The beginning of a systematic approach to evaluation and improvement of key processes is evident. | A fact-based, systematic evaluation and improvement process and some organizational learning, including innovation, are in place for improving the efficiency and effectiveness of key processes. | Fact-based, systematic evaluation and improvement and organizational learning, including innovation, are key management tools; there is clear evidence of refinement as a result of organizational-level analysis and sharing. | Fact-based, systematic evaluation and improvement and organizational learning through innovation are key organization-wide tools; refinement and innovation, backed by analysis and sharing, are evident throughout the organization. |
| | | | | X | | |
| **Integration** | No organizational alignment is evident; individual areas or work units operate independently. | The approach is aligned with other areas or work units largely through joint problem solving. | The approach is in the early stages of alignment with basic organizational needs identified in response to the Organizational Profile and other process Items. | The approach is aligned with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is integrated with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is well integrated with organizational needs identified in response to the Organizational Profile and other Process Items. |
| | | | | | X | |

The overall score is not intended to be a numerical average of the elements above; rather the overall range and score is one which the Examiner team felt was the most descriptive of the organization's achievement level for this Item.

| Item 1.2 Overall Scoring Range | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| | | | | | X | |

## 2.0 Strategic Planning

Your overall score in this Category is in the **70–85** percentage range. Refer to Figure 2, "Criteria Scoring Guidelines (Process)," on page 46.

### 2.1 Strategy Development

Your score in this Item is in the **90–100** percentage range.

*Strengths:*

| Item reference | Description |
|---|---|
| 2.1a(1) | **Pewaukee School District (PSD) has had an eleven-step strategic planning process in place for fifteen years (Figure 2.1-1) involving a wide variety of stakeholders including, but not limited to, parents, faculty, students, and community leaders. This process has been improved through the inclusion of Baldrige Criteria in Step 3, addresses potential blind spots via a SWOT analysis and environmental scan, is aligned with the mission, vision and values of the organization, and provides a base for performance measurement and commitment to continuous improvement.** |
| 2.1a(2) | **The strategic planning process addresses strengths, weaknesses, opportunities, and threats (SWOT) through an annual analysis used to revise strategic plan goals and long-term sustainability through proactive budgeting, facilities planning, and succession planning. The strategic plan stays future-focused by early identification, through adoption and integration of major technology shifts, and by leadership staying on top of educational reform through reading, conference attendance, networking, and graduate study. Leadership also monitors and partners with the organization's competitors to keep current and to help execute and develop the strategic plan.** |
| 2.1b(1) | PSD develops key strategic goals and initiatives (Figure 2.1-5) during the strategic planning process, which includes all stakeholder groups. These goals and initiatives are aligned with the organization's mission and beliefs. |
| 2.1b(2) | The strategic planning process aligns strategic objectives with strategic challenges and advantages. The use of a SWOT analysis and an annual environment scan enhances the strategic planning process. |

*Opportunities for Improvement:*

| Item reference | Description |
|---|---|
| 2.1a(2) | Although the district invites a variety of stakeholders to participate in the strategic planning process, there is not a systematic approach to determining and validating whether invited stakeholders appropriately represent new, changing, and special student populations, e.g. expected growth in English language learners and low socioeconomic status student populations, thus ensuring the planning process inputs accurately and fully represent the voice of all stakeholder groups. |

## Item 2.1 Evaluation Factor Score Summary

| Factor | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| **Approach** | No systematic approach to Item requirements is evident; information is anecdotal. | The beginning of a systematic approach to the basic requirements of the Item is evident. | An effective, systematic approach, responsive to the basic requirements of the Item, is evident. | An effective, systematic approach, responsive to the overall requirements of the Item, is evident. | An effective, systematic approach, responsive to the multiple requirements of the Item, is evident. | An effective, systematic approach, fully responsive to the multiple requirements of the Item, is evident. |
| | | | | | | X |
| **Deployment** | Little or no deployment of any systematic approach is evident. | The approach is in the early stages of deployment in most areas or work units, inhibiting progress in achieving the basic requirements of the Item. | The approach is deployed, although some areas or work units are in early stages of deployment. | The approach is well deployed, although deployment may vary in some areas or work units. | The approach is well deployed, with no significant gaps. | The approach is fully deployed without significant weaknesses or gaps in any areas or work units. |
| | | | | | X | |
| **Learning** | An improvement orientation is not evident; improvement is achieved through reacting to problems. | Early stages of a transition from reacting to problems to a general improvement orientation are evident. | The beginning of a systematic approach to evaluation and improvement of key processes is evident. | A fact-based, systematic evaluation and improvement process and some organizational learning, including innovation, are in place for improving the efficiency and effectiveness of key processes. | Fact-based, systematic evaluation and improvement and organizational learning, including innovation, are key management tools; there is clear evidence of refinement as a result of organizational-level analysis and sharing. | Fact-based, systematic evaluation and improvement and organizational learning through innovation are key organization-wide tools; refinement and innovation, backed by analysis and sharing, are evident throughout the organization. |
| | | | | | X | |
| **Integration** | No organizational alignment is evident; individual areas or work units operate independently. | The approach is aligned with other areas or work units largely through joint problem solving. | The approach is in the early stages of alignment with basic organizational needs identified in response to the Organizational Profile and other process Items. | The approach is aligned with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is integrated with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is well integrated with organizational needs identified in response to the Organizational Profile and other Process Items. |
| | | | | | | X |
| The overall score is not intended to be a numerical average of the elements above; rather the overall range and score is one which the Examiner team felt was the most descriptive of the organization's achievement level for this Item. | | | | | | |
| **Item 2.1 Overall Scoring Range** | **0-5%** | **10-25%** | **30-45%** | **50-65%** | **70-85%** | **90-100%** |
| | | | | | | X |

## 2.2 Strategy Deployment

Your score in this Item is in the **70–85** percentage range.

*Strengths:*

| Item reference | Description |
|---|---|
| 2.2a(1) | PSD develops and deploys action plans during steps 4 through 9 of the strategic planning process (Figure 2.1-1), which include a grid charting steps, responsibility, timeline, resources, evidence of attainment, and staff development needs (Figure 2.2-1). |
| 2.2a(2) | The Administrative Team (AT) anticipates, determines, and allocates necessary financial resources for current and future needs through a comprehensive budget development process via the annual strategic planning process and makes ongoing adjustments based on regular monitoring. |
| 2.2a(3,4) | Key short-term and long-term plans (one year action plans and multi-year strategic initiatives, respectively) leverage organizational agility when need arises such as course curriculum updates outside the usual cycle. The environmental scan, an integral part of the strategic planning process, is used to anticipate and plan for market and stakeholder changes. |
| 2.2a(6) | Action plans align with strategic objectives (via the continuous improvement plan), identify key performance measures (Figure 2.2-1 provides a sample), including timeline, responsibility, resources, and evidence of attainment, and are reviewed and modified as needed on a quarterly basis. |

*Opportunities for Improvement:*

| Item reference | Description |
|---|---|
| 2.2b | Although PSD gathers competitive information, there is not a fully deployed systematic approach to gathering, using, and learning from comparative or comparable key benchmark data to address current and projected potential performance gaps. Consistent processes may allow the organization to better identify and address these performance gaps. For example, although art program benchmark data were initially gathered, the district did not measure its own progress against these results. |

## Item 2.2 Evaluation Factor Score Summary

| Factor | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| **Approach** | No systematic approach to Item requirements is evident; information is anecdotal. | The beginning of a systematic approach to the basic requirements of the Item is evident. | An effective, systematic approach, responsive to the basic requirements of the Item, is evident. | An effective, systematic approach, responsive to the overall requirements of the Item, is evident. | An effective, systematic approach, responsive to the multiple requirements of the Item, is evident. | An effective, systematic approach, fully responsive to the multiple requirements of the Item, is evident. |
| | | | | | X | |
| **Deployment** | Little or no deployment of any systematic approach is evident. | The approach is in the early stages of deployment in most areas or work units, inhibiting progress in achieving the basic requirements of the Item. | The approach is deployed, although some areas or work units are in early stages of deployment. | The approach is well deployed, although deployment may vary in some areas or work units. | The approach is well deployed, with no significant gaps. | The approach is fully deployed without significant weaknesses or gaps in any areas or work units. |
| | | | | X | | |
| **Learning** | An improvement orientation is not evident; improvement is achieved through reacting to problems. | Early stages of a transition from reacting to problems to a general improvement orientation are evident. | The beginning of a systematic approach to evaluation and improvement of key processes is evident. | A fact-based, systematic evaluation and improvement process and some organizational learning, including innovation, are in place for improving the efficiency and effectiveness of key processes. | Fact-based, systematic evaluation and improvement and organizational learning, including innovation, are key management tools; there is clear evidence of refinement as a result of organizational-level analysis and sharing. | Fact-based, systematic evaluation and improvement and organizational learning through innovation are key organization-wide tools; refinement and innovation, backed by analysis and sharing, are evident throughout the organization. |
| | | | | X | | |
| **Integration** | No organizational alignment is evident; individual areas or work units operate independently. | The approach is aligned with other areas or work units largely through joint problem solving. | The approach is in the early stages of alignment with basic organizational needs identified in response to the Organizational Profile and other process Items. | The approach is aligned with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is integrated with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is well integrated with organizational needs identified in response to the Organizational Profile and other Process Items. |
| | | | | | X | |

The overall score is not intended to be a numerical average of the elements above; rather the overall range and score is one which the Examiner team felt was the most descriptive of the organization's achievement level for this Item.

| Item 2.2 Overall Scoring Range | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| | | | | | X | |

## 3.0 Student, Stakeholder, and Market Focus

Your overall score in this Category is in the **50–65** percentage range. Refer to Figure 2, "Criteria Scoring Guidelines (Process)," on page 46.

### 3.1 Student, Stakeholder, and Market Knowledge

Your score in this Item is in the **50–65** percentage range.

*Strengths:*

| Item reference | Description |
|---|---|
| 3.1a(2) | Pewaukee School District's (PSD) strategic planning process uses a variety of Voice of the Customer mechanisms to bring its mission to life including, but not limited to, two-way communication with all stakeholders, various partnerships, frequent face-to-face communication, and information availability on the organization's website as well as commitment to the distribution of various printed materials to the community. |
| 3.1a(3) | The district is student- and stakeholder-focused as a result of Voice of the Customer approaches used in the strategic planning process and gathered from focus groups, surveys, two-way communication, and other mechanisms (Figure 3.1-2). For example, four-year-old kindergarten programs were added based on parent feedback, and the current technology plan was highly informed by student, teacher, and parent and guardian input. |
| 3.1a(4) | PSD keeps listening and learning methods current through the strategic planning process and affiliations with community and educational connections. The Board of Education and district leaders are active in community and educational organizations. Teachers are involved in the American Productivity and Quality Centers and professional learning communities. Learning Together segments are incorporated into each Administrative Team (AT) agenda, allowing for study and reflections on books and articles. |

*Opportunities for Improvement:*

| Item reference | Description |
|---|---|
| 3.1a(2) | Although complaint data occurs informally in some areas of the organization, there is not a fully deployed systematic approach to collecting, monitoring, analyzing and reporting complaint data. This may make it difficult for the district to make relevant improvements and be fully responsive to stakeholder needs or validate that proposed improvements meet the needs of all stakeholders. |
| 3.1a(4) | Although PSD has identified changes in its education community, there is no systematic approach in place to ensure that listening and learning methods are current with or appropriate to these identified changes. For example, there are several non-English speaking families, caregivers and other stakeholders in the community, but there is not a clearly defined process in place to effectively and efficiently communicate with these stakeholders. |

## Item 3.1 Evaluation Factor Score Summary

| Factor | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| **Approach** | No systematic approach to Item requirements is evident; information is anecdotal. | The beginning of a systematic approach to the basic requirements of the Item is evident. | An effective, systematic approach, responsive to the basic requirements of the Item, is evident. | An effective, systematic approach, responsive to the overall requirements of the Item, is evident. | An effective, systematic approach, responsive to the multiple requirements of the Item, is evident. | An effective, systematic approach, fully responsive to the multiple requirements of the Item, is evident. |
| | | | | X | | |
| **Deployment** | Little or no deployment of any systematic approach is evident. | The approach is in the early stages of deployment in most areas or work units, inhibiting progress in achieving the basic requirements of the Item. | The approach is deployed, although some areas or work units are in early stages of deployment. | The approach is well deployed, although deployment may vary in some areas or work units. | The approach is well deployed, with no significant gaps. | The approach is fully deployed without significant weaknesses or gaps in any areas or work units. |
| | | | | X | | |
| **Learning** | An improvement orientation is not evident; improvement is achieved through reacting to problems. | Early stages of a transition from reacting to problems to a general improvement orientation are evident. | The beginning of a systematic approach to evaluation and improvement of key processes is evident. | A fact-based, systematic evaluation and improvement process and some organizational learning, including innovation, are in place for improving the efficiency and effectiveness of key processes. | Fact-based, systematic evaluation and improvement and organizational learning, including innovation, are key management tools; there is clear evidence of refinement as a result of organizational-level analysis and sharing. | Fact-based, systematic evaluation and improvement and organizational learning through innovation are key organization-wide tools; refinement and innovation, backed by analysis and sharing, are evident throughout the organization. |
| | | | | X | | |
| **Integration** | No organizational alignment is evident; individual areas or work units operate independently. | The approach is aligned with other areas or work units largely through joint problem solving. | The approach is in the early stages of alignment with basic organizational needs identified in response to the Organizational Profile and other process Items. | The approach is aligned with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is integrated with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is well integrated with organizational needs identified in response to the Organizational Profile and other Process Items. |
| | | | | X | | |
| The overall score is not intended to be a numerical average of the elements above; rather the overall range and score is one which the Examiner team felt was the most descriptive of the organization's achievement level for this Item. | | | | | | |
| **Item 3.1 Overall Scoring Range** | **0-5%** | **10-25%** | **30-45%** | **50-65%** | **70-85%** | **90-100%** |
| | | | | X | | |

## 3.2 Student and Stakeholder Relationships and Satisfaction

Your score in this Item is in the **50–65** percentage range.

*Strengths:*

| Item reference | Description |
|---|---|
| 3.2a(1) | **PSD builds relationships to nurture student and other stakeholder satisfaction and loyalty through the Parent Teacher Organization, Parent Advisory Group, student councils, the Pewaukee Booster Club, and the Strategic Planning Team, as well as reaching out to a variety of community groups through meetings, volunteer opportunities, press releases, newsletters, and other communication methods.** |
| 3.2a(2) | The district has numerous access mechanisms to provide feedback including its website, phone and voicemail, regular one-to-one conversations, and surveys with parents, teachers, students and the community. Results are presented to the Board of Education and shared with all employees and parents. The results are used to inform the strategic plan, drive creation of continuous improvement plan goals, and guide the professional learning community and Parent Advisory Group. |
| 3.2b(1) | Student and other stakeholder satisfaction, including the satisfaction of alumni, is determined via end-of-the-year surveys and as needed with other focus groups. Survey results are analyzed during the summer and used to drive improvements and develop action plans. |
| 3.2b(4) | PSD keeps approaches to determining satisfaction current through the use of a variety of surveys, which feed into the strategic plan. New initiatives are in place to broaden the base of stakeholder input. New software and improved technology facilitate communication with teachers. This is in alignment with curriculum, instruction, and assessment as well as community connections strategies. |

*Opportunities for Improvement:*

| Item reference | Description |
|---|---|
| 3.2a(3) | Although there are phone logs in place in some areas being used to capture complaints, the district is in the early stages of deploying a systematic process for the collection and resolution of these complaints. Without data to aggregate and analyze, the district may not be able to minimize student and stakeholder dissatisfaction, leading to potential loss of positive referrals that could affect open enrollment, relationships with realtors, and the community. |
| 3.2b(3) | There was not evidence of a robust process for gathering, using, and learning from comparative or comparable key benchmark data to assess all stakeholder satisfaction with competitors. Without a fully deployed systematic approach the district may not have a clear understanding of its current state relative to its competitors. This might inhibit the organization's ability to achieve the desired state of providing innovative and progressive education to open the door to each child's future. |

## Item 3.2 Evaluation Factor Score Summary

| Factor | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| **Approach** | No systematic approach to Item requirements is evident; information is anecdotal. | The beginning of a systematic approach to the basic requirements of the Item is evident. | An effective, systematic approach, responsive to the basic requirements of the Item, is evident. | An effective, systematic approach, responsive to the overall requirements of the Item, is evident. | An effective, systematic approach, responsive to the multiple requirements of the Item, is evident. | An effective, systematic approach, fully responsive to the multiple requirements of the Item, is evident. |
| | | | | X | | |
| **Deployment** | Little or no deployment of any systematic approach is evident. | The approach is in the early stages of deployment in most areas or work units, inhibiting progress in achieving the basic requirements of the Item. | The approach is deployed, although some areas or work units are in early stages of deployment. | The approach is well deployed, although deployment may vary in some areas or work units. | The approach is well deployed, with no significant gaps. | The approach is fully deployed without significant weaknesses or gaps in any areas or work units. |
| | | | | X | | |
| **Learning** | An improvement orientation is not evident; improvement is achieved through reacting to problems. | Early stages of a transition from reacting to problems to a general improvement orientation are evident. | The beginning of a systematic approach to evaluation and improvement of key processes is evident. | A fact-based, systematic evaluation and improvement process and some organizational learning, including innovation, are in place for improving the efficiency and effectiveness of key processes. | Fact-based, systematic evaluation and improvement and organizational learning, including innovation, are key management tools; there is clear evidence of refinement as a result of organizational-level analysis and sharing. | Fact-based, systematic evaluation and improvement and organizational learning through innovation are key organization-wide tools; refinement and innovation, backed by analysis and sharing, are evident throughout the organization. |
| | | | | X | | |
| **Integration** | No organizational alignment is evident; individual areas or work units operate independently. | The approach is aligned with other areas or work units largely through joint problem solving. | The approach is in the early stages of alignment with basic organizational needs identified in response to the Organizational Profile and other process Items. | The approach is aligned with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is integrated with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is well integrated with organizational needs identified in response to the Organizational Profile and other Process Items. |
| | | | | X | | |
| The overall score is not intended to be a numerical average of the elements above; rather the overall range and score is one which the Examiner team felt was the most descriptive of the organization's achievement level for this Item. | | | | | | |
| **Item 3.2 Overall Scoring Range** | **0-5%** | **10-25%** | **30-45%** | **50-65%** | **70-85%** | **90-100%** |
| | | | | X | | |

## 4.0 Measurement, Analysis, and Knowledge Management

Your overall score in this Category is in the **50–65** percentage range. Refer to Figure 2, "Criteria Scoring Guidelines (Process)," on page 46.

### 4.1 Measurement, Analysis, and Improvement of Organizational Performance

Your score in this Item is in the **50–65** percentage range.

*Strengths:*

| Item reference | Description |
|---|---|
| 4.1a(1) | Pewaukee School District (PSD) uses a 360° framework (Figure 4.1-2) to inform the strategic planning process and to identify measures to support continuous improvement and to improve student learning, daily operations, and overall organizational performance. The resulting performance indicators ("success measures") are tracked, shared and used to identify areas for improvement that feed back into the strategic planning process. |
| 4.1a(3) | The district's performance measurement system stays current, enabling the organization to quickly make adjustments due to changing needs through collaborative quarterly reviews and learning processes. |
| 4.1b(1) | Organizational performance review findings are translated into priorities for organizational improvement and opportunities for innovation at the district, school, and department levels. Strategic plan goals drive the development of continuous improvement plans and action plans in every school and department, creating an ability to respond rapidly to changing needs and challenges, resulting in an agile organization. |

*Opportunities for Improvement:*

| Item reference | Description |
|---|---|
| 4.1a(1) | No systematic process is evident whereby PSD can ensure that balanced scorecard measures represent the vital few measures that drive high performance, nor is a method evident to determine when scorecard measures are no longer vital and should be eliminated. A too-broad selection of balanced scorecard measures may divert focus from the most important measures related to the organization's strategic goals. |
| 4.1b(3) | Although the results of organizational performance reviews are tracked, there is not a comprehensive deployment of accessing and analyzing the data to inform, evaluate, and improve the delivery of high-quality instruction. |

## Item 4.1 Evaluation Factor Score Summary

| Factor | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| **Approach** | No systematic approach to Item requirements is evident; information is anecdotal. | The beginning of a systematic approach to the basic requirements of the Item is evident. | An effective, systematic approach, responsive to the basic requirements of the Item, is evident. | An effective, systematic approach, responsive to the overall requirements of the Item, is evident. | An effective, systematic approach, responsive to the multiple requirements of the Item, is evident. | An effective, systematic approach, fully responsive to the multiple requirements of the Item, is evident. |
| | | | | | X | |
| **Deployment** | Little or no deployment of any systematic approach is evident. | The approach is in the early stages of deployment in most areas or work units, inhibiting progress in achieving the basic requirements of the Item. | The approach is deployed, although some areas or work units are in early stages of deployment. | The approach is well deployed, although deployment may vary in some areas or work units. | The approach is well deployed, with no significant gaps. | The approach is fully deployed without significant weaknesses or gaps in any areas or work units. |
| | | | | X | | |
| **Learning** | An improvement orientation is not evident; improvement is achieved through reacting to problems. | Early stages of a transition from reacting to problems to a general improvement orientation are evident. | The beginning of a systematic approach to evaluation and improvement of key processes is evident. | A fact-based, systematic evaluation and improvement process and some organizational learning, including innovation, are in place for improving the efficiency and effectiveness of key processes. | Fact-based, systematic evaluation and improvement and organizational learning, including innovation, are key management tools; there is clear evidence of refinement as a result of organizational-level analysis and sharing. | Fact-based, systematic evaluation and improvement and organizational learning through innovation are key organization-wide tools; refinement and innovation, backed by analysis and sharing, are evident throughout the organization. |
| | | | | | X | |
| **Integration** | No organizational alignment is evident; individual areas or work units operate independently. | The approach is aligned with other areas or work units largely through joint problem solving. | The approach is in the early stages of alignment with basic organizational needs identified in response to the Organizational Profile and other process Items. | The approach is aligned with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is integrated with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is well integrated with organizational needs identified in response to the Organizational Profile and other Process Items. |
| | | | | X | | |

The overall score is not intended to be a numerical average of the elements above; rather the overall range and score is one which the Examiner team felt was the most descriptive of the organization's achievement level for this Item.

| Item 4.1 Overall Scoring Range | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| | | | | X | | |

## 4.2 Management of Information, Information Technology, and Knowledge

Your score in this Item is in the **50–65** percentage range.

*Strengths:*

| Item reference | Description |
|---|---|
| 4.2a(1) | The district's data and information are accessible via a secure campus-wide technology infrastructure that provides user-friendly data access to stakeholders based on need. Selected data and information are shared with external stakeholders, partners, and collaborators via the district, family access, and school websites and email. |
| 4.2a(2) | Software is acquired systematically and evaluated before applications are packaged for final deployment, usually during the curriculum and assessment review cycle. Hardware is rotated out of production during the summer on a five-year cycle to stay current, and all computers are cleaned and re-imaged annually. |
| 4.2a(3) | PSD ensures continued availability of hardware and software systems and of data and information in the event of emergencies through daily and weekly server backups. School management software data is backed up locally and streamed nightly to an offsite location. In the event of an emergency, remote data can be accessed by a local vendor if the data center is not able to function, and in the event of loss of the data center, the offsite backup would restore data to hardware in the remote facility. |
| 4.2a(4) | Data and information availability mechanisms, including software and hardware systems, are kept current through the strategic planning process, long range technology plans, and a cyclical review of curriculum and assessment to plan for the addition of technology in all areas. Input is solicited from stakeholders via student discussion forums and parent and community stakeholder forums after hours. The IT department works closely with school technology committees to identify and fund technology improvements for instructional and communication purposes. For example, the 8th grade 1:1 laptop initiative was a direct result of output of a technology committee. |
| 4.2b(1) | Multiple protection systems are in place throughout the technology infrastructure to ensure the integrity, confidentiality, timeliness, and daily and emergency backup of data and information, including passwords and secure login; Barracuda anti-virus, anti-spam, and custom filters; and Sonicwall protection via a multiple protective function firewall. Data systems are real-time, and data are backed up nightly and weekly. |

*Opportunities for Improvement:*

| Item reference | Description |
|---|---|
| 4.2b(2) | Although the district has some sharing and implementing of best practices, the organization is in the early stages of developing and deploying a consistent approach for identifying, sharing, and implementing best practices. For example, learnings from personal learning communities are not systematically shared across the organization. |

## Item 4.2 Evaluation Factor Score Summary

| Factor | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| **Approach** | No systematic approach to Item requirements is evident; information is anecdotal. | The beginning of a systematic approach to the basic requirements of the Item is evident. | An effective, systematic approach, responsive to the basic requirements of the Item, is evident. | An effective, systematic approach, responsive to the overall requirements of the Item, is evident. | An effective, systematic approach, responsive to the multiple requirements of the Item, is evident. | An effective, systematic approach, fully responsive to the multiple requirements of the Item, is evident. |
| | | | | | X | |
| **Deployment** | Little or no deployment of any systematic approach is evident. | The approach is in the early stages of deployment in most areas or work units, inhibiting progress in achieving the basic requirements of the Item. | The approach is deployed, although some areas or work units are in early stages of deployment. | The approach is well deployed, although deployment may vary in some areas or work units. | The approach is well deployed, with no significant gaps. | The approach is fully deployed without significant weaknesses or gaps in any areas or work units. |
| | | | | | X | |
| **Learning** | An improvement orientation is not evident; improvement is achieved through reacting to problems. | Early stages of a transition from reacting to problems to a general improvement orientation are evident. | The beginning of a systematic approach to evaluation and improvement of key processes is evident. | A fact-based, systematic evaluation and improvement process and some organizational learning, including innovation, are in place for improving the efficiency and effectiveness of key processes. | Fact-based, systematic evaluation and improvement and organizational learning, including innovation, are key management tools; there is clear evidence of refinement as a result of organizational-level analysis and sharing. | Fact-based, systematic evaluation and improvement and organizational learning through innovation are key organization-wide tools; refinement and innovation, backed by analysis and sharing, are evident throughout the organization. |
| | | | | X | | |
| **Integration** | No organizational alignment is evident; individual areas or work units operate independently. | The approach is aligned with other areas or work units largely through joint problem solving. | The approach is in the early stages of alignment with basic organizational needs identified in response to the Organizational Profile and other process Items. | The approach is aligned with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is integrated with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is well integrated with organizational needs identified in response to the Organizational Profile and other Process Items. |
| | | | | X | | |

The overall score is not intended to be a numerical average of the elements above; rather the overall range and score is one which the Examiner team felt was the most descriptive of the organization's achievement level for this Item.

| Item 4.2 Overall Scoring Range | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| | | | | X | | |

## 5.0 Workforce Focus

Your overall score in this Category is in the **50–65** percentage range. Refer to Figure 2, "Criteria Scoring Guidelines (Process)," on page 46.

### 5.1 Workforce Engagement

Your score in this Item is in the **50–65** percentage range.

*Strengths:*

| Item reference | Description |
|---|---|
| 5.1a(1) | Pewaukee School District (PSD) determines key factors affecting workforce engagement and satisfaction through open communication at all levels. Time is allotted at each school to determine staff and student needs. Collaborative teaming is promoted by commitment to professional learning communities and additional listening posts including stakeholder surveys. Needs are communicated at each building level to principals who forward the information to the Administrative Team (AT) and faculty. The process is aligned with the strategic planning and continuous improvement plan processes, supporting the district's mission and strategic initiatives. |
| 5.1a(2) | The district fosters an organizational culture conducive to high performance and a motivated workforce through methods that include diverse teams from each school and multiple grade levels participating in the curriculum and assessment renewals process to foster collaboration and teacher leadership; careful annual staffing evaluation to optimize the talents and licensure of faculty members; review of individual staff goals for alignment with supervisory goals; and biweekly meetings to discuss implementation of action plans. Feedback is provided to all teachers through classroom walkthroughs, providing them opportunities to reflect on their teaching practices. This is in alignment with the curriculum, instruction, and assessment initiative to provide a rigorous and relevant curriculum and program options delivered by high quality educators. |
| 5.1a(3) | **The workforce performance management system supports high performance and workforce engagement. The Superintendent relays strategic plan initiatives for the year and reinforces the mission for all staff members at the welcome-back breakfast. All new teachers receive mentoring and define a professional development plan. All teachers identify goals based on department and continuous improvement plan goals shaped by the strategic plan. A comprehensive evaluation system provides regular performance feedback. This review cycle is tracked for each employee. PSD provides support for continuing education as well as salary schedule advancement. The performance management system provides for alignment of all action plans throughout the organization.** |
| 5.1b(1) | The district addresses teaching staff and administrative assistants' learning needs, accomplishment of action plans, and faculty development. An annual district professional development plan, fed by data mining, organizational goal setting, benchmarking, and annual reporting, feeds into the strategic plan and sets the deployment of a wide array of learning opportunities. Individual goals are linked to continuous improvement and strategic plans to address learning needs. |
| 5.1c(1) | PSD uses formal and informal methods, including continuous improvement plans, employee surveys, performance evaluations, goal setting meetings, and face-to-face interactions to assess workforce engagement and satisfaction. These methods and measures are aligned with strategic goals and key work processes, and they support a culture of service to students, parents, and the community. |

*Opportunities for Improvement:*

| Item reference | Description |
|---|---|
| 5.1a(1) | **The organization does not determine key factors affecting workforce engagement and satisfaction results for some types of support staff (food service, custodial staff, paraprofessionals, and aides). Understanding factors that drive engagement and satisfaction for all employee groups could enhance employee motivation and morale, leading to increased organizational effectiveness.** |
| 5.1b(1) | Although the district has a strong informal collaborative communication networking culture resulting in some organizational knowledge transfer, a consistent systematic deployment of knowledge sharing does not exist. |
| 5.1b(2) | PSD does not systematically identify personal leadership attributes for development and career progression. The failure to effectively and consistently identify potential leaders for development and career progression could make it difficult to fully engage high performing employees, and optimize succession planning. |

## Item 5.1 Evaluation Factor Score Summary

| Factor | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| **Approach** | No systematic approach to Item requirements is evident; information is anecdotal. | The beginning of a systematic approach to the basic requirements of the Item is evident. | An effective, systematic approach, responsive to the basic requirements of the Item, is evident. | An effective, systematic approach, responsive to the overall requirements of the Item, is evident. | An effective, systematic approach, responsive to the multiple requirements of the Item, is evident. | An effective, systematic approach, fully responsive to the multiple requirements of the Item, is evident. |
| | | | | X | | |
| **Deployment** | Little or no deployment of any systematic approach is evident. | The approach is in the early stages of deployment in most areas or work units, inhibiting progress in achieving the basic requirements of the Item. | The approach is deployed, although some areas or work units are in early stages of deployment. | The approach is well deployed, although deployment may vary in some areas or work units. | The approach is well deployed, with no significant gaps. | The approach is fully deployed without significant weaknesses or gaps in any areas or work units. |
| | | | | X | | |
| **Learning** | An improvement orientation is not evident; improvement is achieved through reacting to problems. | Early stages of a transition from reacting to problems to a general improvement orientation are evident. | The beginning of a systematic approach to evaluation and improvement of key processes is evident. | A fact-based, systematic evaluation and improvement process and some organizational learning, including innovation, are in place for improving the efficiency and effectiveness of key processes. | Fact-based, systematic evaluation and improvement and organizational learning, including innovation, are key management tools; there is clear evidence of refinement as a result of organizational-level analysis and sharing. | Fact-based, systematic evaluation and improvement and organizational learning through innovation are key organization-wide tools; refinement and innovation, backed by analysis and sharing, are evident throughout the organization. |
| | | | | X | | |
| **Integration** | No organizational alignment is evident; individual areas or work units operate independently. | The approach is aligned with other areas or work units largely through joint problem solving. | The approach is in the early stages of alignment with basic organizational needs identified in response to the Organizational Profile and other process Items. | The approach is aligned with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is integrated with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is well integrated with organizational needs identified in response to the Organizational Profile and other Process Items. |
| | | | | X | | |
| The overall score is not intended to be a numerical average of the elements above; rather the overall range and score is one which the Examiner team felt was the most descriptive of the organization's achievement level for this Item. | | | | | | |
| **Item 5.1 Overall Scoring Range** | **0-5%** | **10-25%** | **30-45%** | **50-65%** | **70-85%** | **90-100%** |
| | | | | X | | |

## 5.2 Workforce Environment

Your score in this Item is in the **70–85** percentage range.

*Strengths:*

| Item reference | Description |
|---|---|
| 5.2a(1) | PSD assesses workforce capability and capacity needs as part of the Board of Education budgeting process based on multiple factors addressing the needs of departments and buildings. Projections are based on student enrollment, monies available, class sizes, and special needs. Because of the unique campus setting, the district is able to use shared staff to increase versatility in staffing. The workforce needs assessment aligns with the facilities strategic initiative of leveraging the campus setting, which is identified as a core competency. |
| 5.2a(2) | **The district has a systematic approach to recruiting, hiring, placing, and retaining new teachers. The selection process includes extensive screening and rigorous interviewing processes to assess fit with culture and to ensure hiring of highly qualified candidates. Retention practices include structured orientation, mentoring, coaching, counseling, self-reflection, and ready access to management as needed. This is in alignment with the curriculum, instruction, and assessment strategic initiative to provide curriculum and program options with high quality educators.** |
| 5.2a(4) | The annual strategic planning process, continuous improvement plan efforts, and the curriculum and assessment renewal process support workforce capability. Every teacher establishes goals to support the initiatives of the strategic and continuous improvement plans. A job-embedded staff development approach promotes ongoing learning. The mentor program for new teachers supports professional learning needs of each teacher in his or her career cycle stage. |
| 5.2b(1) | PSD ensures and improves workplace health, safety, and security. The Safety Committee is composed of key district employees as well as outside safety consultants. The district is proactive in establishing safety policies and procedures. Annual training in safety measures is provided. Security practices include required ID badges, visitor registration, the Emergency Response Team, and surveillance cameras. A campus evacuation plan is in place and all AT members are certified by National Incident Management Systems. Staff wellness initiatives are also in place in collaboration with a local health care provider that provides screenings and recommendations for healthy lifestyles. These practices are aligned with the facilities strategic initiative to update and enhance existing safety and security systems throughout the district. |
| 5.2b(2) | The district supports the workforce via policies and benefits. Board of Education policies are reviewed and updated as needed every five years. Pertinent Board of Education policies and procedures are included in handbooks in place at each school. Employee needs are regularly analyzed, and benefit plans are adjusted and negotiated to ensure that they meet those needs. Board of Education policies are aligned across the system, and employee policies and benefits support the district's mission and workforce goals. |

*Opportunities for Improvement:*

| Item reference | Description |
|---|---|
| 5.2a(2) | The workforce does not reflect the diversity of the communities it serves. This could limit the district's ability to meet the needs of current and future students or address/keep up with community changes, e.g. English language learner student and parent segments. |

## Item 5.2 Evaluation Factor Score Summary

| Factor | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| **Approach** | No systematic approach to Item requirements is evident; information is anecdotal. | The beginning of a systematic approach to the basic requirements of the Item is evident. | An effective, systematic approach, responsive to the basic requirements of the Item, is evident. | An effective, systematic approach, responsive to the overall requirements of the Item, is evident. | An effective, systematic approach, responsive to the multiple requirements of the Item, is evident. | An effective, systematic approach, fully responsive to the multiple requirements of the Item, is evident. |
| | | | | | X | |
| **Deployment** | Little or no deployment of any systematic approach is evident. | The approach is in the early stages of deployment in most areas or work units, inhibiting progress in achieving the basic requirements of the Item. | The approach is deployed, although some areas or work units are in early stages of deployment. | The approach is well deployed, although deployment may vary in some areas or work units. | The approach is well deployed, with no significant gaps. | The approach is fully deployed without significant weaknesses or gaps in any areas or work units. |
| | | | | | X | |
| **Learning** | An improvement orientation is not evident; improvement is achieved through reacting to problems. | Early stages of a transition from reacting to problems to a general improvement orientation are evident. | The beginning of a systematic approach to evaluation and improvement of key processes is evident. | A fact-based, systematic evaluation and improvement process and some organizational learning, including innovation, are in place for improving the efficiency and effectiveness of key processes. | Fact-based, systematic evaluation and improvement and organizational learning, including innovation, are key management tools; there is clear evidence of refinement as a result of organizational-level analysis and sharing. | Fact-based, systematic evaluation and improvement and organizational learning through innovation are key organization-wide tools; refinement and innovation, backed by analysis and sharing, are evident throughout the organization. |
| | | | | | X | |
| **Integration** | No organizational alignment is evident; individual areas or work units operate independently. | The approach is aligned with other areas or work units largely through joint problem solving. | The approach is in the early stages of alignment with basic organizational needs identified in response to the Organizational Profile and other process Items. | The approach is aligned with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is integrated with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is well integrated with organizational needs identified in response to the Organizational Profile and other Process Items. |
| | | | | | X | |
| The overall score is not intended to be a numerical average of the elements above; rather the overall range and score is one which the Examiner team felt was the most descriptive of the organization's achievement level for this Item. | | | | | | |
| **Item 5.2 Overall Scoring Range** | **0-5%** | **10-25%** | **30-45%** | **50-65%** | **70-85%** | **90-100%** |
| | | | | | X | |

## 6.0 Process Management

Your overall score in this Category is in the **50–65** percentage range. Refer to Figure 2, "Criteria Scoring Guidelines (Process)," on page 46.

### 6.1 Work Systems Design

Your score in this Item is in the **70–85** percentage range.

*Strengths:*

| Item reference | Description |
|---|---|
| 6.1a(1) | Core competencies are discussed through annual retreats and during Administrative Team (AT) and Board of Education meetings held more frequently. They are reflected in Pewaukee School District's (PSD) mission and action plans through the strategic planning process, have been refined since the strategic planning process began in 1992, and are validated through stakeholder surveys. |
| 6.1a(2) | The organization's primary work process (improving curriculum, instruction, and assessment) is designed and innovated through the strategic plan by addressing five key questions. This primary work process undergoes a five-year curriculum renewal cycle (Figure 4.1-3) using a systematic process that involves (per curriculum area) a two-year investigation process, after which curricula and assessments are drafted, teaching skills are developed, district benchmark assessments are developed, and then instruction and assessments are conducted and monitored. In 2007, the strategic plan integrated the three strands of curriculum, instruction, and assessment into one strategy area. |
| 6.1b(1) | **The four key work processes and their associated key work systems (figure 6.1-1) reflect the district's core competencies of 1) a unique campus setting used to enhance staff talents to more effectively serve students and 2) a commitment to continuous improvement through key requirements and measures that are designed to ensure student and stakeholder value. These key work processes are imbedded in five areas (foundational; curriculum, instruction, and assessment; community connections; technology, and facilities), reviewed annually through strategic planning, and aligned with PSD's mission.** |
| 6.1b(2) | Key work process requirements are identified through the use of multiple stakeholder listening and learning methods (Figure 3.1-2). These requirements have been determined to be agility, flexibility, ability to be measured, and sustainability. To address individual differences in student learning, PSD analyzes the performance of individual students both annually (adequate yearly progress) and through regular measures of academic progress. A pyramid of interventions (Figure 6.1-2) is used to proactively and systematically address students in need of greater assistance, and the Talented and Gifted program offers an array of options for students with identified as talented and gifted. |

*Opportunities for Improvement:*

| Item reference | Description |
|---|---|
| 6.1b(3) | Although PSD is working towards being a fully aligned K-12 organization, the incorporation of organizational knowledge into process design is not fully deployed across buildings due to inconsistent knowledge sharing. Failure to leverage the all-campus-setting core competency to improve the availability of organizational knowledge to be used in process design could jeopardize the organization's ability to maximize student learning. |

## Item 6.1 Evaluation Factor Score Summary

| Factor | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| **Approach** | No systematic approach to Item requirements is evident; information is anecdotal. | The beginning of a systematic approach to the basic requirements of the Item is evident. | An effective, systematic approach, responsive to the basic requirements of the Item, is evident. | An effective, systematic approach, responsive to the overall requirements of the Item, is evident. | An effective, systematic approach, responsive to the multiple requirements of the Item, is evident. | An effective, systematic approach, fully responsive to the multiple requirements of the Item, is evident. |
| | | | | | X | |
| **Deployment** | Little or no deployment of any systematic approach is evident. | The approach is in the early stages of deployment in most areas or work units, inhibiting progress in achieving the basic requirements of the Item. | The approach is deployed, although some areas or work units are in early stages of deployment. | The approach is well deployed, although deployment may vary in some areas or work units. | The approach is well deployed, with no significant gaps. | The approach is fully deployed without significant weaknesses or gaps in any areas or work units. |
| | | | | X | | |
| **Learning** | An improvement orientation is not evident; improvement is achieved through reacting to problems. | Early stages of a transition from reacting to problems to a general improvement orientation are evident. | The beginning of a systematic approach to evaluation and improvement of key processes is evident. | A fact-based, systematic evaluation and improvement process and some organizational learning, including innovation, are in place for improving the efficiency and effectiveness of key processes. | Fact-based, systematic evaluation and improvement and organizational learning, including innovation, are key management tools; there is clear evidence of refinement as a result of organizational-level analysis and sharing. | Fact-based, systematic evaluation and improvement and organizational learning through innovation are key organization-wide tools; refinement and innovation, backed by analysis and sharing, are evident throughout the organization. |
| | | | | X | | |
| **Integration** | No organizational alignment is evident; individual areas or work units operate independently. | The approach is aligned with other areas or work units largely through joint problem solving. | The approach is in the early stages of alignment with basic organizational needs identified in response to the Organizational Profile and other process Items. | The approach is aligned with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is integrated with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is well integrated with organizational needs identified in response to the Organizational Profile and other Process Items. |
| | | | | | X | |

The overall score is not intended to be a numerical average of the elements above; rather the overall range and score is one which the Examiner team felt was the most descriptive of the organization's achievement level for this Item.

| Item 6.1 Overall Scoring Range | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| | | | | | X | |

## 6.2 Work Process Management and Improvement

Your score in this Item is in the **50–65** percentage range.

*Strengths:*

| Item reference | Description |
|---|---|
| 6.2a(1) | PSD has identified key performance measures for its work processes (Figure 6.1-1) and support processes (Figure 6.2-1) and provides quarterly reports to the AT. In addition, the organization uses weekly professional learning community meetings to discuss student achievement while sharing curriculum, assessment data, common lesson plans, and best practice relative to instruction, student needs, and specific interventions where needed. Regular Building Leadership Team meetings, including representatives from each grade within a school, also ensure that work processes meet design requirements. These measures and discussions are aligned with the curriculum, instruction, and assessment strategic initiative. |
| 6.2a(2) | The campus setting allows for working in close proximity among similar grade levels to lessen the likelihood of variability in curriculum, instruction, and assessment in different classrooms. In addition, team leaders and the AT work to ensure consistency in delivery of the curriculum and instruction through the use of common assessments. Curriculum, instruction, and assessment consistency is also achieved through the use of common textbooks, the creation of an articulated elementary-care-through-grade-12 curriculum, publishing continuous improvement plans for all departments, publishing meeting minutes, and through monitoring by classroom walkthroughs and the evaluation system. |
| 6.2b | **The strategic plan drives continuous improvement plans, which are used at the organization, building, and district department levels to make key improvements to increase achievement levels. Each continuous improvement plan is based on data and goals established in the strategic plan. The continuous improvement planning process begins with a needs assessment and data inquiry using 360 degrees of data. Long-range goals are developed with targets and measures based on academic and organizational needs. Target goals are assessed quarterly and annually with progress posted to the internal district webpage. All continuous improvement plans include action plans, resources, and timelines. Plans are adjusted as needed.** |

*Opportunities for Improvement:*

| Item reference | Description |
|---|---|
| 6.2b | While the continuous improvement plan process is used to make key improvements to work processes as driven by the strategic plan, a systematic process is not fully deployed for improvement opportunities not included in existing continuous improvement plans. Without systematic deployment for all improvement initiatives at all levels of the organization, the district could fail to maximize student success. |

## Item 6.2 Evaluation Factor Score Summary

| Factor | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| **Approach** | No systematic approach to Item requirements is evident; information is anecdotal. | The beginning of a systematic approach to the basic requirements of the Item is evident. | An effective, systematic approach, responsive to the basic requirements of the Item, is evident. | An effective, systematic approach, responsive to the overall requirements of the Item, is evident. | An effective, systematic approach, responsive to the multiple requirements of the Item, is evident. | An effective, systematic approach, fully responsive to the multiple requirements of the Item, is evident. |
| | | | | | X | |
| **Deployment** | Little or no deployment of any systematic approach is evident. | The approach is in the early stages of deployment in most areas or work units, inhibiting progress in achieving the basic requirements of the Item. | The approach is deployed, although some areas or work units are in early stages of deployment. | The approach is well deployed, although deployment may vary in some areas or work units. | The approach is well deployed, with no significant gaps. | The approach is fully deployed without significant weaknesses or gaps in any areas or work units. |
| | | | | X | | |
| **Learning** | An improvement orientation is not evident; improvement is achieved through reacting to problems. | Early stages of a transition from reacting to problems to a general improvement orientation are evident. | The beginning of a systematic approach to evaluation and improvement of key processes is evident. | A fact-based, systematic evaluation and improvement process and some organizational learning, including innovation, are in place for improving the efficiency and effectiveness of key processes. | Fact-based, systematic evaluation and improvement and organizational learning, including innovation, are key management tools; there is clear evidence of refinement as a result of organizational-level analysis and sharing. | Fact-based, systematic evaluation and improvement and organizational learning through innovation are key organization-wide tools; refinement and innovation, backed by analysis and sharing, are evident throughout the organization. |
| | | | | X | | |
| **Integration** | No organizational alignment is evident; individual areas or work units operate independently. | The approach is aligned with other areas or work units largely through joint problem solving. | The approach is in the early stages of alignment with basic organizational needs identified in response to the Organizational Profile and other process Items. | The approach is aligned with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is integrated with organizational needs identified in response to the Organizational Profile and other Process Items. | The approach is well integrated with organizational needs identified in response to the Organizational Profile and other Process Items. |
| | | | | X | | |

The overall score is not intended to be a numerical average of the elements above; rather the overall range and score is one which the Examiner team felt was the most descriptive of the organization's achievement level for this Item.

| Item 6.2 Overall Scoring Range | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| | | | | X | | |

# 7.0 Results

Your overall score in this Category is in the **30–45** percentage range. Refer to Figure 3, "Criteria Scoring Guidelines (Results)," on page 47.

## 7.1 Student Learning Outcomes

Your score in this Item is in the **50–65** percentage range.

*Strengths:*

| Item reference | Description |
|---|---|
| 7.1a | Over 75% of students taking AP tests have scored 3 or higher in every academic year since at least 2005 (Figure 7.1-7), and average ACT scores have trended favorably from about 22.5 in 2005 to 23.4 in 2008. Average ACT scores compare favorably to an average southeastern Wisconsin score of 22 and 22.1 for all of Wisconsin; trend data compare favorably to local, state, and world-class organizations. |
| 7.1a | Truancy rates (Figure 7.1-10) have been at or near zero since 2005, dropout rates (Figure 7.1-11) have declined from just over 0.5% in 2005 to 0.25% in 2008, and attendance rates (Figure 7.1-12) have been sustained at, near, or above the Baldrige schools benchmark from 2005 to the present. |
| 7.1a | Male student performance on the Grade 10 Wisconsin Knowledge and Concept Examination (WKCE) shows a generally favorable trend, increasing from about 75% in the 2003–04 school year to about 80% in the current school year (Figure 7.1-6). |
| 7.1a | Pewaukee School District (PSD) shows favorable levels for many student achievement measures. For example, grade 3 WKCE scores ranked second in Waukesha County for 2008 (Figure 7.1-1), 90% of grade 4 reading scores were advanced or proficient in 2008, 91% of grade 8 math scores were advanced or proficient in 2008 (Figure 7.3-3), grade 8 reading scores ranked fourth in Waukesha County for 2008 (Figure 7.1-4), and 91% of grade 8 math scores were advanced or proficient for 2008 (Figure 7.1-5). All scores have consistently fallen in the top quartile since at least the 2005–06 school year and have often been in the top decile. |

*Opportunities for Improvement:*

| Item reference | Description |
|---|---|
| 7.1a | Successful student performance on district benchmark assessments is a strategic plan goal with results used to assess knowledge acquisition by individual students and the effectiveness of instruction for a benchmarked period of time. The district does not identify similar assessment approaches being used by competitors or comparable organizations to compare performance. Without considering and using comparable data or learnings for improvements, PSD may not be able to determine its competitive position, potentially affecting its ability to deliver high-quality education. |
| 7.1a | Limited segmentation of student performance results could cause the district to miss opportunities for improvement for specific underperforming student segments. |

## Item 7.1 Evaluation Factor Score Summary

| Guidelines | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| **Performance Levels (Le)** | There are no organizational performance results or poor results in areas reported. | A few organizational performance results are reported, and early good performance levels are evident in a few areas. | Good organizational performance levels are reported for some areas of importance to the Item requirements. | Good organizational performance levels are reported for most areas of importance to the Item requirements. | Good to excellent organizational performance levels are reported for most areas of importance to the Item requirements. | Excellent organizational performance levels are reported for most areas of importance to the Item requirements. |
| | | | | X | | |
| **Trends (T)** | Trend data are either not reported or show mainly adverse trends. | Some trend data are reported, with some adverse trends evident. | Some trend data are reported, and a majority of the trends presented are beneficial. | Beneficial trends are evident in areas of importance to the accomplishment of the organization's mission. | Beneficial trends have been sustained over time in most areas of importance to the accomplishment of the organization's mission. | Beneficial trends have been sustained over time in all areas of importance to the accomplishment of the organization's mission. |
| | | | | X | | |
| **Comparisons and Benchmarks (C)** | Comparative information is not reported. | Little or no comparative information is reported. | Early stages of obtaining comparative information are evident. | Some current performance levels have been evaluated against relevant comparisons and/or benchmarks and show areas of good relative performance. | Many to most trends and current performance levels have been evaluated against relevant comparisons and/or benchmarks and show areas of leadership and very good relative performance. | Evidence of industry/education sector/health care sector and benchmark leadership is demonstrated in many areas. |
| | | | | X | | |
| **Integration (I)** | Results are not reported for any areas of importance to the accomplishment of the organization's mission. | Results are reported for a few areas of importance to the accomplishment of the organization's mission. | Results are reported for many areas of importance to the accomplishment of the organization's mission. | Organizational performance results are reported for most key customer/student/ patient, stakeholder, market, and process requirements. | Organizational performance results are reported for most key customer/student/ patient, market, process, and action plan requirements, and they include some projections of future performance. | Organizational performance results fully address key customer/student/ patient, market, process, and action plan requirements, and they include projections of future performance. |
| | | | | X | | |
| The overall score is not intended to be a numerical average of the elements above; rather the overall range and score is one which the Examiner team felt was the most descriptive of the organization's achievement level for this Item. | | | | | | |
| **Item 7.1 Overall Scoring Range** | **0-5%** | **10-25%** | **30-45%** | **50-65%** | **70-85%** | **90-100%** |
| | | | | X | | |

## 7.2 Student- and Stakeholder-Focused Outcomes

Your score in this Item is in the **30–45** percentage range.

*Strengths:*

| Item reference | Description |
|---|---|
| 7.2a(1) | Overall student satisfaction (Figure 7.2-1) has been above 75% since the 2005–06 school year for each school represented and most are trending favorably. The information is used to determine areas in need of improvement and informs the creation of continuous improvement plans. Results are shared with the Board of Education and stakeholders. |
| 7.2a(1) | Levels of parent satisfaction on all elements presented for the elementary schools are at or near 100% of parents responding positively for the three years presented. Levels have been at 75% or above for the middle and high schools for the three years presented on the same elements (Figures 7.2-3 through 7.2-6), including overall parent satisfaction and satisfaction with welcoming climate, school safety, and communication. |
| 7.2a(2) | **Stakeholder-perceived value is demonstrated by the increase in students choosing open enrollment, from about 50 in the 2002–03 school year to over 160 in the 2007–08 school year, (Figure 7.2-7) and the tax levy vote with 100% citizen support since the 2004–05 school year (Figure 7.2-8).** |

*Opportunities for Improvement:*

| Item reference | Description |
|---|---|
| 7.2a | 2007–08 survey results do not include satisfaction with contracted agencies (food and transportation services). Without this information the district could be missing valuable feedback on strengths to build on or opportunities for improvement related to these partners. |
| 7.2a(1) | Comparisons are made among schools in the district; however, no comparisons outside of the district are provided—for example, the district does not compare student and stakeholder satisfaction, perceived value, stakeholder persistence, and positive referrals among its competitors (including surrounding districts with whom it competes for open enrollment students and private educational institutions within its district boundaries). |
| 7.2a(1) | **PSD does not report dissatisfaction indicator results that may become part of process improvement initiatives to enable the district to be more responsive to stakeholder needs.** |
| 7.2a(2) | Extracurricular activities are cited as one of the top three reasons why parents send their children to the district's schools, yet no results for satisfaction with these activities are presented. Without these results, it may be difficult for the organization to understand and build its relationships with students, parents, community members, and other stakeholders and to improve or expand extracurricular programming. |

## Item 7.2 Evaluation Factor Score Summary

| Guidelines | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| **Performance Levels (Le)** | There are no organizational performance results or poor results in areas reported. | A few organizational performance results are reported, and early good performance levels are evident in a few areas. | Good organizational performance levels are reported for some areas of importance to the Item requirements. | Good organizational performance levels are reported for most areas of importance to the Item requirements. | Good to excellent organizational performance levels are reported for most areas of importance to the Item requirements. | Excellent organizational performance levels are reported for most areas of importance to the Item requirements. |
| | | | | X | | |
| **Trends (T)** | Trend data are either not reported or show mainly adverse trends. | Some trend data are reported, with some adverse trends evident. | Some trend data are reported, and a majority of the trends presented are beneficial. | Beneficial trends are evident in areas of importance to the accomplishment of the organization's mission. | Beneficial trends have been sustained over time in most areas of importance to the accomplishment of the organization's mission. | Beneficial trends have been sustained over time in all areas of importance to the accomplishment of the organization's mission. |
| | | | | X | | |
| **Comparisons and Benchmarks (C)** | Comparative information is not reported. | Little or no comparative information is reported. | Early stages of obtaining comparative information are evident. | Some current performance levels have been evaluated against relevant comparisons and/or benchmarks and show areas of good relative performance. | Many to most trends and current performance levels have been evaluated against relevant comparisons and/or benchmarks and show areas of leadership and very good relative performance. | Evidence of industry/education sector/health care sector and benchmark leadership is demonstrated in many areas. |
| | | X | | | | |
| **Integration (I)** | Results are not reported for any areas of importance to the accomplishment of the organization's mission. | Results are reported for a few areas of importance to the accomplishment of the organization's mission. | Results are reported for many areas of importance to the accomplishment of the organization's mission. | Organizational performance results are reported for most key customer/student/ patient, stakeholder, market, and process requirements. | Organizational performance results are reported for most key customer/student/ patient, market, process, and action plan requirements, and they include some projections of future performance. | Organizational performance results fully address key customer/student/ patient, market, process, and action plan requirements, and they include projections of future performance. |
| | | | X | | | |
| The overall score is not intended to be a numerical average of the elements above; rather the overall range and score is one which the Examiner team felt was the most descriptive of the organization's achievement level for this Item. | | | | | | |
| **Item 7.2 Overall Scoring Range** | **0-5%** | **10-25%** | **30-45%** | **50-65%** | **70-85%** | **90-100%** |
| | | | X | | | |

## 7.3 Budgetary, Financial, and Market Outcomes

Your score in this Item is in the **30–45** percentage range.

*Strengths:*

| Item reference | Description |
|---|---|
| 7.3a(1) | **PSD's fund balance (Figure 7.3-1) has increased favorably from $300,000 in the 2002–03 school year to over $2,600,000. Revenue has shown a favorable trend in the same time period and consistently been higher than expenses (Figure 7.3-2), the district's equalized tax rate has declined over the same time period (Figure 7.3-3), and property values have increased from about $700,000 to approximately $1,150,000 per pupil.** |
| 7.3a(2) | Open enrollment history for incoming and outgoing students, possible indicators of market share, have both trended favorably. |

*Opportunities for Improvement:*

| Item reference | Description |
|---|---|
| 7.3a(2) | **Although open enrollment data are tracked (Figure 7.2-7) and show favorable trends, data on market share or position or growth are not tracked. Without this information, the district may not be able to respond to anticipated market changes including potential increases in students attending private schools, growth in the community, and open enrollment.** |
| 7.3a | Although state comparison data are shown for some measures including property value per pupil and equalized tax rate, the district uses few comparative/comparable data to assess its financial and market position. Without these data, the organization may find it difficult to determine its position within an increasingly competitive environment. |

## Item 7.3 Evaluation Factor Score Summary

| Guidelines | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| **Performance Levels (Le)** | There are no organizational performance results or poor results in areas reported. | A few organizational performance results are reported, and early good performance levels are evident in a few areas. | Good organizational performance levels are reported for some areas of importance to the Item requirements. | Good organizational performance levels are reported for most areas of importance to the Item requirements. | Good to excellent organizational performance levels are reported for most areas of importance to the Item requirements. | Excellent organizational performance levels are reported for most areas of importance to the Item requirements. |
| | | | | X | | |
| **Trends (T)** | Trend data are either not reported or show mainly adverse trends. | Some trend data are reported, with some adverse trends evident. | Some trend data are reported, and a majority of the trends presented are beneficial. | Beneficial trends are evident in areas of importance to the accomplishment of the organization's mission. | Beneficial trends have been sustained over time in most areas of importance to the accomplishment of the organization's mission. | Beneficial trends have been sustained over time in all areas of importance to the accomplishment of the organization's mission. |
| | | | | X | | |
| **Comparisons and Benchmarks (C)** | Comparative information is not reported. | Little or no comparative information is reported. | Early stages of obtaining comparative information are evident. | Some current performance levels have been evaluated against relevant comparisons and/or benchmarks and show areas of good relative performance. | Many to most trends and current performance levels have been evaluated against relevant comparisons and/or benchmarks and show areas of leadership and very good relative performance. | Evidence of industry/education sector/health care sector and benchmark leadership is demonstrated in many areas. |
| | | X | | | | |
| **Integration (I)** | Results are not reported for any areas of importance to the accomplishment of the organization's mission. | Results are reported for a few areas of importance to the accomplishment of the organization's mission. | Results are reported for many areas of importance to the accomplishment of the organization's mission. | Organizational performance results are reported for most key customer/student/ patient, stakeholder, market, and process requirements. | Organizational performance results are reported for most key customer/student/ patient, market, process, and action plan requirements, and they include some projections of future performance. | Organizational performance results fully address key customer/student/ patient, market, process, and action plan requirements, and they include projections of future performance. |
| | | | X | | | |
| The overall score is not intended to be a numerical average of the elements above; rather the overall range and score is one which the Examiner team felt was the most descriptive of the organization's achievement level for this Item. | | | | | | |
| **Item 7.3 Overall Scoring Range** | **0-5%** | **10-25%** | **30-45%** | **50-65%** | **70-85%** | **90-100%** |
| | | | X | | | |

## 7.4 Workforce-Focused Outcomes

Your score in this Item is in the **30–45** percentage range.

*Strengths:*

| Item reference | Description |
|---|---|
| 7.4a(1) | Teacher satisfaction rates are approaching 100% in all schools. Teacher retention (Figure 7.4-2) and turnover rates (Figure 7.4-3) show mixed trends but currently outperform national averages. |
| 7.4a(2) | PSD has shown improvement in the timely conduction of performance appraisals, nearing 100% timely completion (Figure 7.4-10). This is in support of the commitment to enhancing each employee's development and commitment to achieving strategic goals. |
| 7.4a(3) | Wage and benefits offerings have increased every year since the 2003–04 school year, have outperformed state averages, and are approaching the national average (Figure 7.4-9). Benefit spending has increased 39% over six years, although the rate of increase demonstrates a mixed trend (Figure 7.4-7). |
| 7.4a(3) | Health, safety, and security results exceed national averages is 17 of 18 factors identified in 3 screening surveys completed in collaboration with a local health care system (Figures 7.4-13, 7.4-14, and 7.4-15). Safety improvements resulted in zero lost work days due to workers compensation claims in 2007 (Figure 7.4-11). The district views this as a successful result of the Safety Committee's focused efforts on injury prevention. |

*Opportunities for Improvement:*

| Item reference | Description |
|---|---|
| 7.4a(1) | **With the exception of total staff turnover and staff longevity, reported satisfaction results are for teachers only. Certified teachers, psychologists, speech therapists, guidance counselors, and other education professionals comprise only 62% of the staff or 70% of full-time equivalencies. The district could be missing valuable feedback specific to significant portions of their staff.** |
| 7.4a(1) | Although still favorable relative to the national benchmark, total staff turnover (Figure 7.4-4) has shown an unfavorable trend since 2006. |
| 7.4a(2) | PSD reports numerous key measures such as those related to satisfaction, continuous improvement plans, professional development plans, and the strategic plan but does not report any results for these key measures. Without results it may be difficult to evaluate effectiveness of the district's various plans. |
| 7.4a | Limited segmentation of workforce outcomes may cause the organization to miss opportunities in performance gaps of workforce segments besides teachers. |

## Item 7.4 Evaluation Factor Score Summary

| Guidelines | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| **Performance Levels (Le)** | There are no organizational performance results or poor results in areas reported. | A few organizational performance results are reported, and early good performance levels are evident in a few areas. | Good organizational performance levels are reported for some areas of importance to the Item requirements. | Good organizational performance levels are reported for most areas of importance to the Item requirements. | Good to excellent organizational performance levels are reported for most areas of importance to the Item requirements. | Excellent organizational performance levels are reported for most areas of importance to the Item requirements. |
| | | | | X | | |
| **Trends (T)** | Trend data are either not reported or show mainly adverse trends. | Some trend data are reported, with some adverse trends evident. | Some trend data are reported, and a majority of the trends presented are beneficial. | Beneficial trends are evident in areas of importance to the accomplishment of the organization's mission. | Beneficial trends have been sustained over time in most areas of importance to the accomplishment of the organization's mission. | Beneficial trends have been sustained over time in all areas of importance to the accomplishment of the organization's mission. |
| | | | X | | | |
| **Comparisons and Benchmarks (C)** | Comparative information is not reported. | Little or no comparative information is reported. | Early stages of obtaining comparative information are evident. | Some current performance levels have been evaluated against relevant comparisons and/or benchmarks and show areas of good relative performance. | Many to most trends and current performance levels have been evaluated against relevant comparisons and/or benchmarks and show areas of leadership and very good relative performance. | Evidence of industry/education sector/health care sector and benchmark leadership is demonstrated in many areas. |
| | | | X | | | |
| **Integration (I)** | Results are not reported for any areas of importance to the accomplishment of the organization's mission. | Results are reported for a few areas of importance to the accomplishment of the organization's mission. | Results are reported for many areas of importance to the accomplishment of the organization's mission. | Organizational performance results are reported for most key customer/student/ patient, stakeholder, market, and process requirements. | Organizational performance results are reported for most key customer/student/ patient, market, process, and action plan requirements, and they include some projections of future performance. | Organizational performance results fully address key customer/student/ patient, market, process, and action plan requirements, and they include projections of future performance. |
| | | X | | | | |
| The overall score is not intended to be a numerical average of the elements above; rather the overall range and score is one which the Examiner team felt was the most descriptive of the organization's achievement level for this Item. | | | | | | |
| **Item 7.4 Overall Scoring Range** | **0-5%** | **10-25%** | **30-45%** | **50-65%** | **70-85%** | **90-100%** |
| | | | X | | | |

## 7.5 Process Effectiveness Outcomes

Your score in this Item is in the **30–45** percentage range.

*Strengths:*

| Item reference | Description |
|---|---|
| 7.5a(1) | False fire alarms (Figure 7.5-4) have decreased from a high of 10 in the 2005-06 school year to 3 in each of the last two school years reported. This is identified as a result of the citizenship initiative. |
| 7.5a(2) | Wireless access has grown from 6 access points in the 2006–07 school year to 35 current access points (Figure 7.5-3). |

*Opportunities for Improvement:*

| Item reference | Description |
|---|---|
| 7.5a | Although the district has and uses many measures of organizational effectiveness, few comparative/comparable data are provided. This may inhibit the district's ability to accurately assess the potential to enhance student learning in its current environment of increasing competitiveness. |

## Item 7.5 Evaluation Factor Score Summary

| Guidelines | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| **Performance Levels (Le)** | There are no organizational performance results or poor results in areas reported. | A few organizational performance results are reported, and early good performance levels are evident in a few areas. | Good organizational performance levels are reported for some areas of importance to the Item requirements. | Good organizational performance levels are reported for most areas of importance to the Item requirements. | Good to excellent organizational performance levels are reported for most areas of importance to the Item requirements. | Excellent organizational performance levels are reported for most areas of importance to the Item requirements. |
| | | | | X | | |
| **Trends (T)** | Trend data are either not reported or show mainly adverse trends. | Some trend data are reported, with some adverse trends evident. | Some trend data are reported, and a majority of the trends presented are beneficial. | Beneficial trends are evident in areas of importance to the accomplishment of the organization's mission. | Beneficial trends have been sustained over time in most areas of importance to the accomplishment of the organization's mission. | Beneficial trends have been sustained over time in all areas of importance to the accomplishment of the organization's mission. |
| | | | X | | | |
| **Comparisons and Benchmarks (C)** | Comparative information is not reported. | Little or no comparative information is reported. | Early stages of obtaining comparative information are evident. | Some current performance levels have been evaluated against relevant comparisons and/or benchmarks and show areas of good relative performance. | Many to most trends and current performance levels have been evaluated against relevant comparisons and/or benchmarks and show areas of leadership and very good relative performance. | Evidence of industry/education sector/health care sector and benchmark leadership is demonstrated in many areas. |
| | | | X | | | |
| **Integration (I)** | Results are not reported for any areas of importance to the accomplishment of the organization's mission. | Results are reported for a few areas of importance to the accomplishment of the organization's mission. | Results are reported for many areas of importance to the accomplishment of the organization's mission. | Organizational performance results are reported for most key customer/student/ patient, stakeholder, market, and process requirements. | Organizational performance results are reported for most key customer/student/ patient, market, process, and action plan requirements, and they include some projections of future performance. | Organizational performance results fully address key customer/student/ patient, market, process, and action plan requirements, and they include projections of future performance. |
| | | | X | | | |
| The overall score is not intended to be a numerical average of the elements above; rather the overall range and score is one which the Examiner team felt was the most descriptive of the organization's achievement level for this Item. | | | | | | |
| **Item 7.5 Overall Scoring Range** | **0-5%** | **10-25%** | **30-45%** | **50-65%** | **70-85%** | **90-100%** |
| | | | X | | | |

## 7.6 Leadership Outcomes

Your score in this Item is in the **50–65** percentage range.

*Strengths:*

| Item reference | Description |
|---|---|
| 7.6a(1) | Strategic plan completion (Figure 7.6-2) shows a positive trend from approximately 90% in the 2004–05 school year to nearly 100% in the current year (on track for completion). The strategic plan is a driving force to measure accomplishments of the district. District benchmark assessments and student performance on the WKCE both indicate an upward trend in student achievement. |
| 7.6a(2) | The district reports no breaches in ethical behavior (Figure 1.2-2). These results are linked to standards for organization legal and ethical behavior and are key to positive perception and compliance. Parent satisfaction surveys (Figure 7.2-3 through 7.2-6) indicate overall approval ratings of at least 97.8% at all schools. The district is in regulatory compliance with all agencies with which it interacts. |
| 7.6a(5) | Community service and citizenship are measured by student fundraising activities, contributions to United Way, participation in various community activities and no violent crimes involving PSD students. Contributions to the United Way (Figure 7.6-4) have grown from $1780 in the 2005–06 school year to nearly $2000.00 this year, and truancy, dropout, and attendance results are all favorable (see Item 7.1). |

*Opportunities for Improvement:*

| Item reference | Description |
|---|---|
| 7.6a | The district does not use comparators or benchmarks for some results, including action plan completion rate (Figure 7.6-2). |

## Item 7.6 Evaluation Factor Score Summary

| Guidelines | 0-5% | 10-25% | 30-45% | 50-65% | 70-85% | 90-100% |
|---|---|---|---|---|---|---|
| **Performance Levels (Le)** | There are no organizational performance results or poor results in areas reported. | A few organizational performance results are reported, and early good performance levels are evident in a few areas. | Good organizational performance levels are reported for some areas of importance to the Item requirements. | Good organizational performance levels are reported for most areas of importance to the Item requirements. | Good to excellent organizational performance levels are reported for most areas of importance to the Item requirements. | Excellent organizational performance levels are reported for most areas of importance to the Item requirements. |
| | | | | X | | |
| **Trends (T)** | Trend data are either not reported or show mainly adverse trends. | Some trend data are reported, with some adverse trends evident. | Some trend data are reported, and a majority of the trends presented are beneficial. | Beneficial trends are evident in areas of importance to the accomplishment of the organization's mission. | Beneficial trends have been sustained over time in most areas of importance to the accomplishment of the organization's mission. | Beneficial trends have been sustained over time in all areas of importance to the accomplishment of the organization's mission. |
| | | | | X | | |
| **Comparisons and Benchmarks (C)** | Comparative information is not reported. | Little or no comparative information is reported. | Early stages of obtaining comparative information are evident. | Some current performance levels have been evaluated against relevant comparisons and/or benchmarks and show areas of good relative performance. | Many to most trends and current performance levels have been evaluated against relevant comparisons and/or benchmarks and show areas of leadership and very good relative performance. | Evidence of industry/education sector/health care sector and benchmark leadership is demonstrated in many areas. |
| | | | X | | | |
| **Integration (I)** | Results are not reported for any areas of importance to the accomplishment of the organization's mission. | Results are reported for a few areas of importance to the accomplishment of the organization's mission. | Results are reported for many areas of importance to the accomplishment of the organization's mission. | Organizational performance results are reported for most key customer/student/ patient, stakeholder, market, and process requirements. | Organizational performance results are reported for most key customer/student/ patient, market, process, and action plan requirements, and they include some projections of future performance. | Organizational performance results fully address key customer/student/ patient, market, process, and action plan requirements, and they include projections of future performance. |
| | | | X | | | |
| The overall score is not intended to be a numerical average of the elements above; rather the overall range and score is one which the Examiner team felt was the most descriptive of the organization's achievement level for this Item. | | | | | | |
| **Item 7.6 Overall Scoring Range** | **0-5%** | **10-25%** | **30-45%** | **50-65%** | **70-85%** | **90-100%** |
| | | | | X | | |

## Application Review and Evaluation Process

The process used by the Wisconsin Forward Award to review your WFA application involved three stages. Figure 1 on the next page outlines each of these stages plus further review by our Panel of Judges.

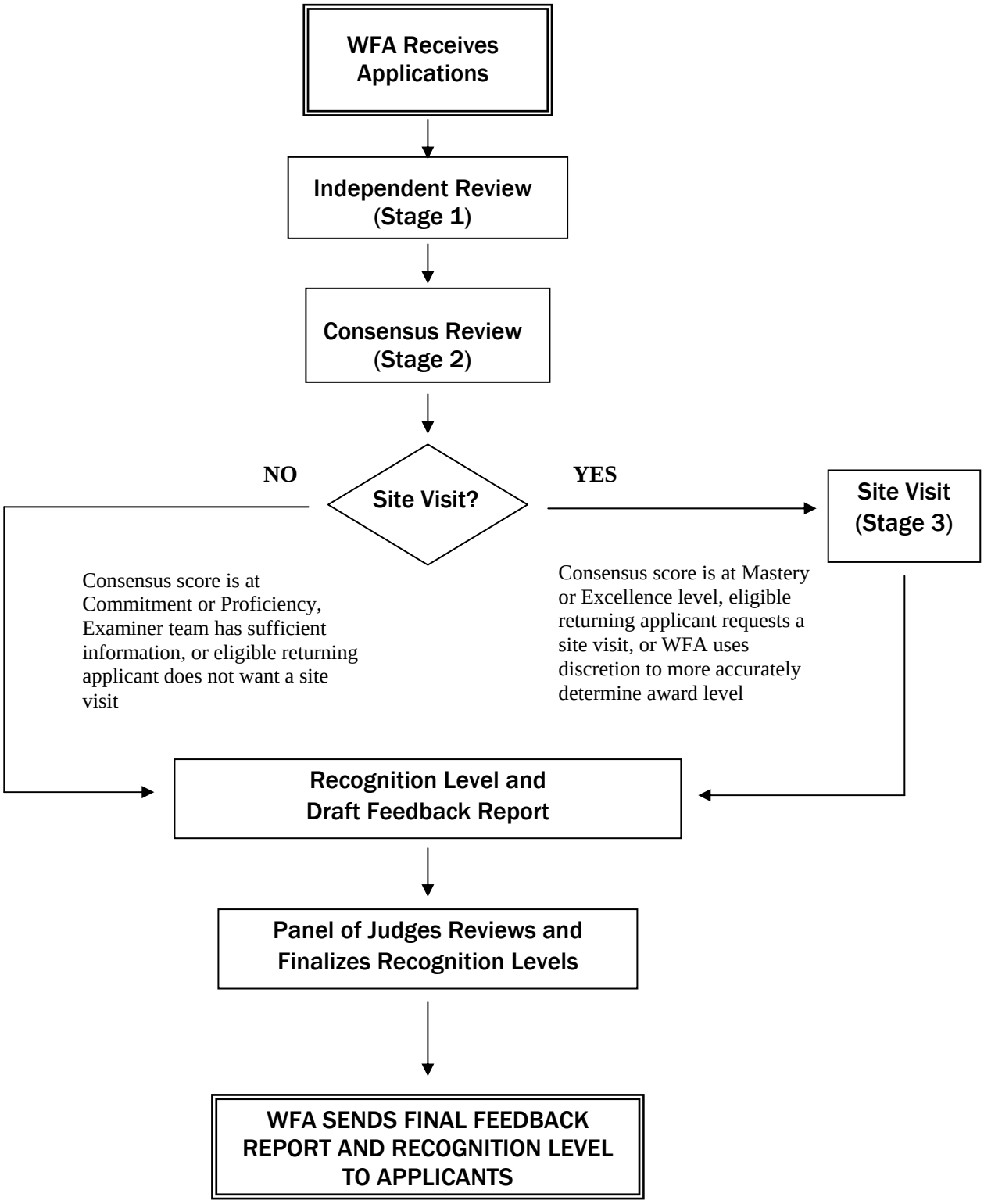
The process began with an ***independent review (Stage 1)***. During this stage, several members of the Wisconsin Forward Award Board of Examiners, including a Team Leader and a mix of Examiners, were assigned to each of the applications under review. Examiner assignments were made to ensure no conflict of interest and the best use of Examiner expertise and experience. Each application was independently evaluated by the assigned Examiners using the scoring system developed for the Malcolm Baldrige Quality Award Program as adopted by the Wisconsin Forward Award program.

Each application then went through a ***consensus review (Stage 2)***. At this stage, a team of Examiners conducted a series of online correspondence, conference calls and/or face-to-face meetings to jointly review the application and reach agreement on key review findings. This included developing consensus on key factors overall and for each individual Item; comments detailing the applicant's strengths and opportunities for improvement; and scoring overall and for each individual Item. The Team Leader directed the consensus review to clarify and resolve any differences resulting from the independent review and to ensure that comments reflected the best possible analysis and thinking of the Examiner team as a whole.

The third stage of review was the **site visit review**. Current applicants who also applied for WFA assessment/recognition in the previous two years and were recognized at the Mastery level or above were eligible for a site visit upon request. New applicants were also eligible for a site visit if the consensus review resulted in a score indicating achievement at the high Mastery level (Band 5) or Excellence level (Band 6 and above). A site visit was conducted to clarify information in the application report, to verify that the information in the application was correct, and to confirm the final standing, including achievement at the Excellence level.

Upon completion of the site visit review and the feedback reports by Examiner teams, the feedback reports were then given to Wisconsin Forward Award's **Panel of Judges** who were assigned to be resources for individual teams and then reviewed the feedback reports as a group to ensure calibration in scoring and application of the Criteria across the teams.

## Figure 1: Evaluation Process



## Wisconsin Forward Award Recognition Levels

The Wisconsin Forward Award program provides a system for recognizing organizations in four categories representative of progress and growth toward performance excellence. Categories are represented by a scoring range reflecting the increasing maturity of a performance management system as defined by the Wisconsin Forward Award Criteria for Performance Excellence.

***Commitment*** is representative of organizations at the earliest stages of implementing quality management practices. Organizations at this stage of development are beginning to adopt and systematically implement performance management and improvement practices and principles as defined by the Criteria. (score range: 0–275)

***Proficiency*** is representative of organizations making significant progress in successful implementation of quality management practices as defined by the Criteria. Applications scoring at this level demonstrate systematic approaches to the primary purposes of most Items in the Criteria and show early improvement trends resulting from their approaches. (score range: 276–475)

***Mastery*** is representative of organizations entering or at an advanced level relative to the Criteria. Applications scoring at this level use effective and systematic approaches. There are no major gaps in deployment, though it may be in early stages in some areas. These organizations demonstrate fact-based improvement processes, good results and improvement trends in most areas of importance. The good results and improvement trends can be directly attributed to their systematic, well-deployed approaches. (score range: 476–675)

***Excellence*** represents the highest achievement level possible under the Wisconsin Forward Award. This achievement level is representative of organizations with mature, fully integrated performance management systems, including improvement systems. Applicants achieving at the Excellence level demonstrate refined approaches, good-to-excellent deployment, good-to-excellent results linked to their well-deployed approaches, and outstanding activities in key areas of the Criteria. They are industry leaders and role models for others. (score range: 676–1000)

## Scoring System

The scoring system is designed to differentiate applicants by the degree of progress demonstrated in successfully implementing performance management practices and principles, to identify the appropriate recognition level for an applicant, and to facilitate feedback. The scoring guidelines, shown in Figures 2 and 3, are based on (1) evidence that a performance management system is in place and the management approach; (2) the depth of deployment; and (3) the results and trends it is achieving.

The applicant receives a percentage range for each Criteria Category (Leadership, Strategic Planning, Customer and Market Focus, etc.). The percentage range is based on the scoring guidelines, which describe the characteristics typically associated with specific percentage ranges. When assessing your organization's results, note that Criteria Categories 1 through 6 consider process scoring guidelines (Figure 2); Category 7 considers results scoring guidelines (Figure 3).

The scoring band descriptors, shown in Figures 4, 5 and 6, provide a gauge of the overall score for an applicant. **New for 2009**, WFA provides three aggregated scoring bands: one each for all process Items, all results Items, and all Items overall. There are eight scoring bands in each scale, ranging from the lowest to the highest total score possible under the Criteria. The bands describe characteristics typically associated with organizations that have an overall score—which may differ from the disaggregated scores for process and results Items—falling in the specific range listed in each scoring band. An applicant's overall score, represented by the scoring band, is derived from the aggregated percentage range scores determined for each Criteria Item.

## Figure 2: Criteria Scoring Guidelines (Process)

| SCORE | Process (Categories 1-6) |
|---|---|
| 0% or 5% | ▪ No systematic approach to Item requirements is evident; information is anecdotal. (A)<br>▪ Little or no deployment of any systematic approach is evident (D)<br>▪ An improvement orientation is not evident; improvement is achieved through reacting to problems (L)<br>▪ No organizational alignment is evident; individual areas or work units operate independently. (I) |
| 10%, 15%, 20%, or 25% | ▪ The beginning of a systematic approach to the basic requirements of the Item is evident. (A)<br>▪ The approach is in the early stages of deployment in most areas or work units, inhibiting progress in achieving the basic requirements of the Item. (D)<br>▪ Early stages of a transition from reacting to problems to a general improvement orientation are evident. (L)<br>▪ The approach is aligned with other areas or work units largely through joint problem solving. (I) |
| 30%, 35%, 40%, or 45% | ▪ An effective, systematic approach, responsive to the basic requirements of the Item, is evident. (A)<br>▪ The approach is deployed, although some areas or work units are in early stages of deployment. (D)<br>▪ The beginning of a systematic approach to evaluation and improvement of key processes is evident. (L)<br>▪ The approach is in the early stages of alignment with your basic organizational needs identified in response to the Organizational Profile and other Process Items. (I) |
| 50%, 55%, 60%, or 65% | ▪ An effective, systematic approach, responsive to the overall requirements of the Item, is evident. (A)<br>▪ The approach is well deployed, although deployment may vary in some areas or work units. (D)<br>▪ A fact-based, systematic evaluation and improvement process and some organizational learning are in place for improving the efficiency and effectiveness of key processes. (L)<br>▪ The approach is aligned with your organizational needs identified in the Organizational Profile and other Process Items. (I) |
| 70%, 75%, 80%, or 85% | ▪ An effective, systematic approach, responsive to the multiple requirements of the item, is evident. (A)<br>▪ The approach is well deployed, with no significant gaps. (D)<br>▪ Fact-based, systematic evaluation and improvement and organizational learning are key management tools; there is clear evidence of refinement and innovation as a result of organizational-level analysis and sharing. (L)<br>▪ The approach is integrated with your organizational needs identified in response to the Organizational Profile and other Process Items. (I) |
| 90%, 95% or 100% | ▪ An effective, systematic approach, fully responsive to the multiple requirements of the Item, is evident. (A)<br>▪ The approach is fully deployed without significant weaknesses or gaps in any areas or work units. (D)<br>▪ Fact-based, systematic evaluation and improvement and organizational learning are key organization-wide tools; refinement and innovation, backed by analysis and sharing, are evident throughout the organization. (L)<br>▪ The approach is well integrated with your organizational needs identified in response to the the Organizational Profile and other Process Items. (I) |

## Figure 3: Criteria Scoring Guidelines (Results)

| SCORE | RESULTS (Category 7) |
|---|---|
| 0% or 5% | ▪ There are no organizational performance results or poor results in areas reported.<br>▪ Trend data are either not reported or show mainly adverse trends.<br>▪ Comparative information is not reported.<br>▪ Results are not reported for any areas of importance to your organization's key mission or business requirements. |
| 10%, 15%, 20%, or 25% | ▪ A few business results are reported; there are some improvements and/or early good performance levels in a few areas.<br>▪ Litte or no trend data are reported, or many of the trends shown are adverse.<br>▪ Little or no comparative information is reported.<br>▪ Results are reported for a few areas of importance to your organization's key mission or business requirements. |
| 30%, 35%, 40%, or 45% | ▪ Improvements and/or good performance levels are reported in many areas addressed in the Item requirements.<br>▪ Early stages of developing trends are evident.<br>▪ Early stages of obtaining comparative information are evident.<br>▪ Results are reported for many areas of importance to your organization's key mission or business requirements. |
| 50%, 55%, 60%, or 65% | ▪ Improvement trends and/or good performance levels are reported for most areas addressed in the Item requirements.<br>▪ No pattern of adverse trends and no poor performance levels are evident in areas of importance to your organization's key mission or business requirements.<br>▪ Some trends and/or current performance levels—evaluated against relevant comparisons and/or benchmarks—show areas of good to very good relative performance.<br>▪ Organizaional performance results address most key customer, market, and process requirements. |
| 70%, 75%, 80%, or 85% | ▪ Current performance is good to excellent in areas of importance to the Item requirements.<br>▪ Most improvement trends and/or current performance levels have been sustained over time.<br>▪ Many to most reported trends and/or current performance levels—evaluated against relevant comparisons and/or benchmarks—show areas of leadership and very good relative performance.<br>▪ Organizational performance results address most key customer, market, process, and action plan requirements. |
| 90%, 95% or 100% | ▪ Current performance is excellent in most areas of importance to the Item requirements.<br>▪ Excellent improvement trends and/or consistently excellent performance levels are reported in most areas.<br>▪ Evidence of industry and benchmark leadership is demonstrated in many areas.<br>▪ Organizational performance results fully address key customer, market, process, and action plan requirements. |

## Figure 4: Process Scoring Band Descriptors

| Band Score | Band Number | PROCESS Descriptors |
|---|---|---|
| 0–150 | 1 | The organization demonstrates early stages of developing and implementing approaches to the basic Criteria requirements, with deployment lagging and inhibiting progress. Improvement efforts are a combination of problem solving and an early general improvement orientation. |
| 151–200 | 2 | The organization demonstrates effective, systematic approaches responsive to the basic requirements of the Criteria, but some areas or work units are in the early stages of deployment. The organization has developed a general improvement orientation that is forward-looking. |
| 201–260 | 3 | The organization demonstrates effective, systematic approaches responsive to the basic requirements of most Criteria Items, although there are still areas or work units in the early stages of deployment. Key processes are beginning to be systematically evaluated and improved. |
| 261–320 | 4 | The organization demonstrates effective, systematic approaches responsive to the overall requirements of the Criteria, but deployment may vary in some areas or work units. Key processes benefit from fact-based evaluation and improvement, and approaches are being aligned with organizational needs. |
| 321–370 | 5 | The organization demonstrates effective, systematic, well-deployed approaches responsive to the overall requirements of most Criteria Items. The organization demonstrates a fact-based, systematic evaluation and improvement process and organizational learning, including innovation, that result in improving the effectiveness and efficiency of key processes. |
| 371–430 | 6 | The organization demonstrates refined approaches responsive to the multiple requirements of the Criteria. These approaches are characterized by the use of key measures, good deployment, and evidence of innovation in most areas. Organizational learning, including innovation and sharing of best practices, is a key management tool, and integration of approaches with organizational needs is evident. |
| 431–480 | 7 | The organization demonstrates refined approaches responsive to the multiple requirements of the Criteria Items. It also demonstrates innovation, excellent deployment, and good-to-excellent use of measures in most areas. Good-to-excellent integration is evident, with organizational analysis, learning through innovation, and sharing of best practices as key management strategies. |
| 481–550 | 8 | The organization demonstrates outstanding approaches focused on innovation. Approaches are fully deployed and demonstrate excellent, sustained use of measures. There is excellent integration of approaches with organizational needs. Organizational analysis, learning through innovation, and sharing of best practices are pervasive. |

## Figure 5: Results Scoring Band Descriptors

| Band Score | Band Number | RESULTS Descriptors |
|---|---|---|
| 0–125 | 1 | Results are reported for a few areas of importance to the accomplishment of the organization's mission, but they generally lack trend and comparative data. |
| 126–170 | 2 | Results are reported for several areas of importance to the Criteria requirements and the accomplishment of the organization's mission. Some of these results demonstrate good performance levels. The use of comparative and trend data is in the early stages. |
| 171–210 | 3 | Results address many areas of importance to the accomplishment of the organization's mission, with good performance being achieved. Comparative and trend data are available for some of these important results areas, and some beneficial trends are evident. |
| 211–255 | 4 | Results address some key customer/stakeholder, market, and process requirements, and they demonstrate good relative performance against relevant comparisons. There are no patterns of adverse trends or poor performance in areas of importance to the Criteria requirements and the accomplishment of the organization's mission. |
| 256–300 | 5 | Results address most key customer/stakeholder, market, and process requirements, and they demonstrate areas of strength against relevant comparisons and/or benchmarks. Improvement trends and/or good performance are reported for most areas of importance to the Criteria requirements and the accomplishment of the organization's mission. |
| 301–345 | 6 | Results address most key customer/stakeholder, market, and process requirements, as well as many action plan requirements. Results demonstrate beneficial trends in most areas of importance to the Criteria requirements and the accomplishment of the organization's mission, and the organization is an industry* leader in some results areas. |
| 346–390 | 7 | Results address most key customer/stakeholder, market, process, and action plan requirements and include projections of future performance. Results demonstrate excellent organizational performance levels and some industry* leadership. Results demonstrate sustained beneficial trends in most areas of importance to the Criteria requirements and the accomplishment of the organization's mission. |
| 391–450 | 8 | Results fully address key customer/stakeholder, market, process, and action plan requirements and include projections of future performance. Results demonstrate excellent organizational performance levels, as well as national and world leadership. Results demonstrate sustained beneficial trends in all areas of importance to the Criteria requirements and the accomplishment of the organization's mission. |

*Industry refers to other organizations performing substantially the same functions, thereby facilitating direct comparisons.

## Figure 6: Scoring Band Descriptors (Overall Score)

| Score | Band # | % of Apps in Band* | Descriptors | WFA Recognition Level |
|---|---|---|---|---|
| 0-275 | 1 | 4.54% | The organization demonstrates the early stages of developing and implementing approaches to Item requirements, with deployment lagging and inhibiting progress. Improvement efforts focus on problem solving. A few important results are reported, but they generally lack trend and comparative data. | **Commitment**<br>Organizations at the earliest stages of implementing quality management practices. Organizations at this stage of development are beginning to adopt and systematically implement performance management and improvement practices and principles as defined by the Criteria. |
| 276-375 | 2 | 18.8% | The organization demonstrates effective, systematic approaches responsive to the basic requirements of the Items, but some areas or work units are in the early stages of deployment. The organization has developed a general improvement orientation that is forward looking. The organization obtains results stemming from its approaches, with some improvements and good performance. The use of comparative and trend data is in the early stages. | **Proficiency**<br>Organizations making significant progress in successful implementation of quality management practices as defined by the Criteria. Applications scoring at this level demonstrate systematic approaches to the primary purposes of most Items in the Criteria and show early improvement trends resulting from their approaches. |
| 376-475 | 3 | 30.5% | The organization demonstrates effective, systematic approaches responsive to the basic requirements of most Items, although there are still areas or work units in the early stages of deployment. Key processes are beginning to be systematically evaluated and improved. Results address many areas of importance to the organization's key requirements, with improvements and/or good performance being achieved. Comparative and trend data are available for some of these important results areas. | |

* Represents band ratings of 154 applications evaluated over a twelve-year period (1998–2009).

**Continued on next page.**

## Figure 6: Scoring Band Descriptors (Overall Score, Continued)

| Score | Band # | % of Apps in Band* | Descriptors | WFA Recognition Level |
|---|---|---|---|---|
| 476-575 | 4 | 27.9% | The organization demonstrates effective, systematic approaches responsive to the overall requirements of the Items, but deployment may vary in some areas or work units. Key processes benefit from fact-based evaluation and improvement, and approaches are being aligned with organizational needs. Results address key customer/stakeholder, market, and process requirements, and they demonstrate some areas of strength and/or good performance against relevant comparisons. There are no patterns of adverse trends or poor performance in areas of importance to the organization's key requirements. | **Mastery**<br>Organizations entering or at an advanced level relative to the Criteria. Applications scoring at this level use effective and systematic approaches. There are no major gaps in deployment, though it may be in early stages in some Areas. These organizations demonstrate fact-based improvement processes, good results and improvement trends in most Areas of importance. The good results and improvement trends can be directly attributed to their systematic, well deployed approaches. |
| 576-675 | 5 | 9.74% | The organization demonstrates effective, systematic, well-deployed approaches responsive to the overall requirements of the Items. The organization demonstrates a fact-based, systematic evaluation and improvement process and organizational learning that result in improving the effectiveness and efficiency of key processes. Results address most key customer/stakeholder, market, and process requirements, and they demonstrate areas of strength against relevant comparisons and/or benchmarks. Improvement trends and/or good performance are reported for most areas of importance to the organization's key requirements. | |

* Represents band ratings of 154 applications evaluated over a twelve-year period (1998–2009).

**Continued on next page.**

## Figure 6: Scoring Band Descriptors (Overall Score, Continued)

| Score | Band # | % of Apps in Band* | Descriptors | WFA Recognition Level |
|---|---|---|---|---|
| 676-775 | 6 | 8.44% | The organization demonstrates refined approaches responsive to the multiple requirements of the Items. These approaches are characterized by the use of key measures, good deployment, evidence of innovation, and very good results in most areas. Organizational integration, learning, and sharing are key management tools. Results address many customer/stakeholder, market, process, and action plan requirements. The organization is an industry* leader in some results areas. | **Excellence**<br>Represents the highest achievement level possible under the Wisconsin Forward Award. This achievement level is representative of organizations with mature, fully integrated performance management systems, including improvement systems. Applicants achieving at the Excellence level demonstrate refined approaches, good to excellent deployment, good to excellent results linked to their well-deployed approaches, and outstanding activities in key areas of the Criteria. They are industry leaders and role models for others. No major red flags exist. |
| 776-875 | 7 | 0 % | The organization demonstrates refined approaches responsive to the multiple requirements of the Items. It also demonstrates innovation, excellent deployment, and good-to-excellent performance levels in most areas. Good-to-excellent integration is evident, with organizational analysis, learning, and sharing of best practices as key management strategies. Industry* leadership and some benchmark leadership are demonstrated in results that address most key customer/stakeholder, market, process, and action plan requirements. | |
| 876-1000 | 8 | 0 % | The organization demonstrates outstanding approaches focused on innovation, full deployment, and excellent, sustained performance results. There is excellent integration of approaches with organizational needs. Organizational analysis, learning, and sharing of best practices are pervasive. National and world leadership is demonstrated in results that fully address key customer/stakeholder, market, process, and action plan requirements. | |

* Represents band ratings of 154 applications evaluated over a twelve-year period (1998–2009).

† "Industry" refers to other organizations performing substantially the same functions, thereby facilitating direct comparison.