



PEWAUKEE SCHOOL DISTRICT

2010 FEEDBACK REPORT

Pewaukee School District 2010 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 6** in process Items (Categories 1–6)
- **Band 5** in results Items (Category 7)
- **Band 6** overall

This assessment places the organization at the **Excellence** recognition level. For an explanation of the scoring bands, please refer to Figure 4, “Scoring Band Descriptors,” on page 59 of this document.

Key Strengths/Outstanding Practices

- Pewaukee School District (PSD) uses its single-campus setting to leverage its investments in personnel and facilities and to take advantage of operating efficiencies. Examples include an art teacher who teaches 60% at Horizon and 40% at Pewaukee Lake, English students at Horizon who walk to the high school for instruction, custodial service-level loading as requirements dictate, shared busing for K-6 and 7-12, and high school volunteers at the elementary schools. Capitalizing on its campus setting is one of the district's core competencies, which gives it various ways to save resources to focus on its main mission, high student achievement.
- The district has created a mission-driven organization with student success at its core. “Opening the door to each child's future” is a mission statement that focuses paraprofessionals, teachers, administrators, and non-academic staff members on the needs of individual students. Examples include power standards for each classroom, shared curriculum and assessments, a focus on innovation both inside and outside of the classroom, and adoption of the Baldrige Criteria as the organization's main improvement model. Placing students and their learning at the core of everything PSD does provides for a clear focus during decision making.
- The Curriculum and Renewal Cycle (CARC) is used to improve and innovate student learning. The systematic CARC process involves teachers from multiple grade levels (examples include K-6 or K-12) working with research, best practices, and input from stakeholders to create new curricula. This shared curriculum development is complemented by shared in-process and final assessments to ensure standardization of high expectations and achievement in both curricula and assessment. This is evidence of the district's vision of offering “a world class education” to its students.
- The organization's value statement is that it delivers “an innovative and progressive education,” and this can be seen in many of its approaches. Examples include the 1:1 laptop initiative in 8th grade and the associated changes in curriculum to add more technology, the Data Wall used in Pewaukee Lake Elementary to visually track student literacy and numeracy achievement, and the change of support department dashboards from being updated quarterly to being updated more regularly, allowing them to be used to make day-to-day decisions. Innovation is a part of the culture of continuous improvement and an expected part of all improvement activities.
- The core competency of a culture of continuous improvement is evident in PSD's mission, values, and goals and the influence of these throughout its decision-making structures. The culture of continuous improvement provides for cycles of learning based on data-driven decision making. The district uses various types of organizational performance reviews (Figure 4.1-2) and the I3 process to translate data into priorities for improvement. Relevant opportunities are deployed organization-wide and to suppliers, partners, and collaborators to ensure organizational alignment through monthly meetings, electronic communications, request for proposals, and face-to-face communications.

Significant Improvement Opportunities for Process Items

- In processes important to the stated goal of going from “very good to great,” PSD’s deployment is incomplete. For example, succession planning does not take place outside of key leadership positions, the complaint management system is inconsistent beyond the principal level, and the triggers for a student entering the Pyramid of Interventions are imprecise. The district has systematic, strong approaches, but without complete deployment, these approaches alone cannot get it to where it is going.
- Best practices are identified throughout the district’s academic areas; however, these are not shared via a systematic method. Teachers do hear about others’ best practices, but through unsystematic, ad-hoc ways, such as hearing about innovative teaching methods through a fortunate email or happenstance attendance at a Board of Education meeting. The systematic sharing and implementation of best practices throughout the organization could assist the organization in going from “a very good organization to a great one.”
- PSD relies on a large volunteer group of parents, high school students, and community members to provide important services throughout the district, including teaching support, paperwork support (making copies, etc.), and other work, but here is no systematic support system in place to identify the needs of volunteers and to ensure that they are fully integrated, trained, and satisfied with their place in the workforce. The voice of this key support group, if addressed, could enhance the mission of the organization as well as ensure sustained and valuable support.
- Although the organization has demonstrated its commitment to effective career progression for the entire workforce, succession planning now in place for senior leaders has not yet been extended to any other parts of the workforce. The lack of formal succession planning for most of the workforce may impact sustainability. A well-deployed succession planning process may help ensure an engaged, high-performing workforce and reduce the associated risks of retirement or other voluntary separation from the district.

Significant Strengths for Results

- In many areas of student learning, PSD has levels that are approaching or exceed either its Baldrige or best-in-Wisconsin comparators. Examples include WKCE scoring (Figures 7.1-1 through 7.1-6), AP exam participation and scoring (Figures 7.1-8 through 7.1-10), college readiness (Figure 7.1-18), and graduation rate (Figure 7.1-12). Student learning results that favorably compare to other high-performing organizations are a result of the student-focused environment cultivated at the district.
- Parent perception of the district is at high levels and is scoring significantly higher than its national comparator in cases in which one is provided (Figures 7.2-1, 7.2-2, 7.2-4, 7.2-6 and 7.2-7). Overall student satisfaction (Figure 7.2-5) and specific student perceptions (Figure 7.2-3) also show PSD scoring at high levels and significantly higher than the national comparator. Stakeholder perception (Grading Your Schools, Figure 7.2-8) shows the organization outscoring the national comparator with a significantly greater number of As and Bs and lesser number of Ds and Fs. Favorable perceptions by these key stakeholders are the outcome of PSD’s efforts to ensure that they are satisfied with their experiences with the district.

Significant Improvement Opportunities for Results

- Though the district uses some comparators, they tend to be regional, state, or national averages and local competitors as opposed to only a few comparators to world-class organizations such as Baldrige winners are used or other best-in-class levels. The organization may find it difficult to fully assess its position in the market and appropriately address its performance and competitive challenges without finding additional, more challenging comparators.

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- Throughout its results, PSD uses limited segmentation. In most cases, segmentation is only by school, workforce group, and, in the case of Asa Clark Middle School, gender and grade. Exploring opportunities for further segmentation may help the district to identify specific differences in key areas that will assist it in identifying requirements that would lead to the continuous and breakthrough improvement it is relying on to go from “very good to great.”

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 57.

1.1 Senior Leadership

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

Strengths:

Item reference	Description
1.1a(3)	Pewaukee School District (PSD) has created an environment for organizational performance improvement, innovation, and agility through its strategic planning process and specifically the development of continuous improvement plans (CIP). Examples of advancements through this culture of continuous improvement include a new heating and cooling system for some buildings (with a return on investment in five years), a newly designed recruitment system, and the integration of instructional technology in the middle school. This culture of continuous improvement, innovation, and agility is important if the district is to meet its vision of providing a “world-class” education.
1.1a(1)	The personal actions of senior leaders reflect a commitment to the organization’s values. They also model the desire to maintain a competitive edge. For example, the building principals offer a facility tour to every family that has applied for open enrollment, and they also contact families who have applied to leave the district to check on potential concerns. These actions demonstrate leaders’ commitment to the values of the school district as well as their desire to compete with surrounding districts for these students.
1.1a,b	The organization deploys its vision and values through its leadership system. Examples include the use of the mission, vision, and values in the development of the strategic plan and CIPs. These provide a foundation for the development of all goals and are posted throughout the organization. Classrooms contain posters of the core competencies and the power standards that have evolved from the strategic planning process. Students then strive to meet these goals and other objectives related to these standards. The development and clear communication of the mission, vision, and values maintain a focus for the entire organization.
1.1a(3)	Senior leaders have contributed to the sustainability of the organization through the use of systematic processes over time. These processes, including strategic planning, employee feedback surveys, and PDSA cycles (Figure 1.1-4) have been utilized for a number of years and drive the decision-making process for senior leaders. These cycles of learning are utilized on a broad scale through environmental scans and a SWOT analysis every year as the strategic plan is updated and for the implementation of goals, which are monitored through CIPs and quality assurance reports (QAR).

Item reference	Description
1.1a(3)	<p>The core competency of a culture of continuous improvement is evident in PSD’s mission, values, and goals and the influence of these throughout its decision-making structures. Processes such as CIPs and QARs are made accountable through the senior leader evaluation system and drive a focus on improvement. Senior leaders provided examples of how financial resources are aligned with strategic goals. Agility was also demonstrated when Senior Leaders refocused their efforts on walkthrough observations based on feedback in midyear evaluations. The decision-making structures that have been implemented provide a framework for data-driven decisions even as leadership changes.</p>
1.1b(1)	<p>The district engages some of its workforce through the two-way communication used during the development of the strategic plan as well as implementation throughout the school year. For example, senior leaders and staff members work together on CIPs to achieve established goals. This communication takes place in the academic areas as well as supporting areas such as building and grounds. Cycles of learning are evidenced by such activities as employee/supervisor interviews, learning walks, and QARs. Workforce engagement is important in leveraging strategic advantages such as a talented and professional workforce and strong leadership.</p>

Opportunities for Improvement:

Item reference	Description
1.1a(3)	<p>Formal succession planning does not take place for most of the workforce, which may negatively impact the sustainability of the organization. A number of teachers are nearing retirement age and will soon be replaced by less-experienced educators. Turnover in paraprofessional and support staff members could also have a negative impact without succession planning. Loss of any employees without planning for succession could result in the loss of institutional knowledge.</p>

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 Societal Responsibilities

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

Strengths:

Item reference	Description
1.2a(1)	PSD achieves accountability for management’s actions through systematic processes (Figure 1.2-2). The Board of Education uses a self-assessment based on strategic goals. Senior leaders on the Administrative Team are held accountable for the achievement of CIPs through regular meetings and the evaluation process. QARs are provided to the Board of Education. In addition to annual reviews of progress on strategic goals, the Board and senior leaders receive feedback during the school year. This level of leadership accountability helps teachers and other staff members feel more secure in supporting the continuous improvement process.
1.2a(2)	The organization has a formal and systematic evaluation system for senior leaders that is overseen by the Superintendent. In addition to holding senior leaders accountable for achievement of strategic goals, feedback provided at mid-year and summative evaluations provides ongoing opportunities for professional growth. Senior leaders communicate high expectations, and there is a culture of continuous improvement, both for individual leaders and the organization as a whole.
1.2a(1)	The district achieves fiscal accountability, transparency in operations, and protection of stakeholder interests through open governance. These are enhanced by Board of Education policies that require input from stakeholders. Fiscal processes and accountability are outlined by statutory requirements and confirmed by external audits. There is also a system of internal controls for fiscal accountability and transparency to stakeholders. Strategic priorities include fiscal goals that are publicized and evaluated. Fiscal resources are realigned during the school year as needed based on CIPs and QARs.
1.2b(1)	PSD has systematic compliance processes in place for achieving, monitoring and surpassing regulatory, safety, and legal requirements. Board of Education Policy Committee and Administrative Cabinet members monitor legal compliance and safety (Figure 1.2-2). Student safety is planned for and reviewed on a regular basis. Crisis drills for students are conducted on a regular basis, and surveys seek feedback regarding student safety.
1.2c(1)	The organization demonstrates consideration for societal well-being and the environmental impact of its schools in a variety of ways. Technology, maintenance of facilities, and operations decisions are based partly on environmental impact (Figure 1.2-5). Having all school facilities on one site helps to maximize efficiencies. Employees and students have initiated several energy conservation programs. Focus on Energy grants have been obtained as well as loans to purchase efficient HVAC systems. Having consideration for the environment as part of organizational decision making deploys this focus throughout the system.

Opportunities for Improvement:

Item reference	Description
1.2a(2)	The Board and senior leaders have accountability for progress on the goals of the organization through evaluation systems tied to these goals; however, there is no method in place to evaluate the members of the Board. The Board’s self-assessment is related to the achievement of strategic goals but does not directly assess member performance. Creating such an evaluation process may help Board members to further their development and effectiveness as leaders.
1.2b(2)	Beyond the expectations outlined in Board policies and staff handbooks, the district has not deployed its approach to ensuring ethical behavior throughout the organization. Clear communication of ethical expectations as well as a deployed process for reporting breaches may reinforce high expectations for all employees of the organization.

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 57.

2.1 Strategy Development

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

Strengths:

Item reference	Description
2.1a(1)	Pewaukee School District (PSD) has an eleven-step systematic process for developing, updating and establishing its strategic plan (Figure 2.1-1). This process has gone through various cycles of learning and improvement, which has resulted in refining the strategic planning process and the identification of relevant comparative data. Maintaining an effective strategic planning process will facilitate the fulfillment of its mission and ensure best use of resources.
2.1b(2)	Actions plans are developed annually by the Administrative Team (AT) and deployed through continuous improvement planning process. Short term and long-term goals are identified by the AT, and are balanced through a review process that maintains a long-term view on the sustainability of the district while meeting current needs in the continuous improvement plan (CIP).
2.1b(2)	PSD balances its financial stability through the allocation of resources during the budgeting process. During the sixth step in the strategic planning process, the AT determines capacity and budgetary requirements. Senior leaders use this process to insure that short-term and long-term goals are adequately funded.
2.1b	The organization aligns its key strategic objectives with its strategic challenges and advantages and establishes a timeline for ensuring the accomplishment of these objectives, and these different facets of the strategic planning process remain fluid and agile. During the past year, PSD has changed its mission and its strategic plan, has developed of a math pilot program, new special needs curriculum pilot program, Write Without Tears program, music & art programs, and alternative education program, and has used a Data Wall in the elementary school to track student literacy and numeracy.

Opportunities for Improvement:

Item reference	Description
2.1a,b	Although district requests that participants from all key stakeholder groups participate in the strategic planning process, participant rosters show that this approach does not result in the participation of representatives from all key stakeholders groups. Not having participation from key stakeholders groups in the development or confirmation of the strategic plan may result in the failure of these plans due to their lack of buy-in.

Item reference	Description
2.1a,b	While a systematic strategic planning process exists, the SWOT and environmental scanning methods currently used to determine strategic advantages and challenges may not be robust enough to identify potential blind spots. The current method asks participants to determine strengths, weaknesses, opportunities, and threats, but participants may not always be knowledgeable about these areas, and relying only upon volunteer participants may mean that the organization misses key changes such as the current economic impact on citizens and recent referendum failures. Relying on a SWOT analysis and environmental scan that could be incomplete may result in basing the strategic plan upon faulty assumptions.

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(2)	The AT drafts action plans as part of the strategic planning process (Figure 2.1-1). These plans include steps, responsible persons, resources needed, defined outcomes, and a completion date (Figure 2.1-8). Principals and their professional learning communities deploy teaching and learning plans. Action plans are monitored via quality assurance reports (QAR) submitted to the Superintendent, helping to ensure sustainability.
2.2a(4)	PDSA improvement cycles are used to revise and deploy action plans. Several examples of the successful use of PDSA cycles are evident (the reaction to referendum failure, additional American Recovery and Reinvestment Act funding, and laptop purchase acceleration). These usages display a well-deployed, systematic approach that has results in cycles of learning.
2.2a(5)	A systematic process exists for assessing staffing and staff development needs due to strategic initiatives and continuous improvement plans; staffing needs are incorporated into the annual budgeting process (Figure 2.1-1).

Opportunities for Improvement:

Item reference	Description
2.2a(2)	Although professional learning communities and department heads are responsible for the deployment of action plans to their respective departments and this deployment is monitored through the submission of quarterly QARs, action plans have not been fully deployed to all workforce members as evidenced by their lack of knowledge about major components of CIPs for their areas. If action plans are not fully deployed to all employees, the district may not be able to keep its staff engaged to complete action plans in a timely manner.
2.2b	PSD has a process for identifying peers and competitors (Figure 2.2-3) for use as comparators during the annual environmental scan and SWOT analysis. However, the district does not always include best-in-class non-educational performers to help it achieve world-class educational performance.
2.2a(2,4)	The district does not fully integrate its vendors into its action plan deployment process. As rapid shifts are identified (such as the acceleration of the 1:1 laptop program), this lack of inclusion may create risks and financial disadvantages. With current state and local economic impacts, vendor inclusion may assist in the achievement of PSD's vision.

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 Customer Focus

Your overall score in this Category is in the **70–85** percentage range. Refer to Figure 2, “Criteria Scoring Guidelines (Process),” on page 57.

3.1 Customer Engagement

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

Strengths:

Item reference	Description
3.1b(2)	Pewaukee School District (PSD) builds and manages relationships with all of its stakeholders based on its communication plan. The annual plan includes communication goals, strategies and key messages, internal and external communication methods, and marketing and outreach activities. It references all stakeholders (Figure P-3) to ensure full coverage. PSD has gone beyond communication to student and parent stakeholder engagement with plans to expand to other stakeholders as well.
3.1b(3)	The district has taken steps to keep its approaches for building student and other stakeholder relationships current with organizational needs and directions by using technology to communicate with stakeholders wherever possible. For example, alumni surveys are now sent out using an online survey method and the School Messenger service is used to communicate with parents regarding student matters. Ensuring that it can continue to build student and other stakeholder relationships gives the organization the ability to continue to engage these important partners in its work.
3.1a(2)	PSD employs multiple support systems for key stakeholders (Figure 3.1-3), including students, parents, alumni and the community. Support systems are targeted to specific stakeholder groups and include school orientation, conferences, interventions, guidance, and communications. Targeting stakeholders with specific support mechanisms ensures that each group gets what it needs to succeed.
3.1a(2)	The organization varies key communication mechanisms for different student and other stakeholder segments. For example, PSD’s key communication is the mass mailing of the Annual Report and <i>Perspective</i> newsletter to all addresses in its Zip Code. The district issues all middle and high school students a school email address and sends communications to these emails to increase student awareness. Communication with elementary students focuses on hard copies sent home on Fridays. The School Messenger service is utilized for emergencies and general announcement reminders with messages delivered via voice mail to all home and mobile numbers. Delivery failure reports are created to update phone number and email lists to ensure that everyone gets communications. By ensuring that communication mechanisms are specific to targeted stakeholders, the district understands and works with their differences.
3.1b	The district is very mission-driven, with a focus on creating an organizational culture that ensures a consistently positive student and stakeholder experience. To improve the culture, student, parent and community advisory groups are charged with providing input into the workings of the district to ensure that they are improved.

Item reference	Description
3.1a(1)	The Curriculum and Assessment Renewal Cycle (CARC) (Figures 3.1-1 & 3.1-2) is the systematic process used to identify and innovate educational programs, offerings, and services and to ensure that they are designed to meet requirements and exceed expectations. Input from parents and students, alumni surveys, and focus groups are considered as a part of the process. Subject area curriculum committees have representation of teachers from all schools and use research, experience, and best practices to create new curricula. Improvements over time have included increased parent input, online surveys, and student input. Build Your Own Curriculum is used to ensure integration and transparency. Shared assessments with two-thirds of the questions on the higher levels of Bloom’s Taxonomy ensure high levels of standardization between classrooms.

Opportunities for Improvement:

Item reference	Description
3.1a(1)	Although Step 5 of the CARC requires participants to develop innovation, the organization’s approach does not rigorously support this requirement. For example, in Step 2 of the CARC (Figure 3.1-1), participants are directed to visit and research competitors for comparable programs, offerings or services. Innovation might be more completely supported if participants were directed to research best-in-class organizations regardless of whether or not they are competitors.
3.1b(1)	Although stakeholders are identified as students, parents, the community, alumni and employees, and PSD does not want to increase its enrollment, it does not specifically seek to build and manage relationships with the community, alumni and employees to acquire new stakeholders or to increase all stakeholders’ engagement. If the district seeks to acquire new or enhance existing relationships with stakeholders, it may provide an additional source of volunteers or potential partnerships for advancing its goals.

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 Voice of the Customer

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

Strengths:

Item reference	Description
3.2a(1)	Several systematic methods exist for listening to students and other stakeholders to obtain information and feedback, including student, parent, and community focus groups, conferences, the website suggestion box, and Board of Education meetings (Figure 3.2-1). These voice-of-the-customer processes are tailored to different student and stakeholder groups and vary with the type of relationship. These methods are deployed across all stakeholder groups and are evidently integrated with the strategic planning process, measurement systems, and work processes.
3.2a(1)	Internal customers such as building support staff, building administrators, and all district office staff members are surveyed annually to obtain feedback for services. Additional surveys are conducted when requested, for example when IT tickets are completed. The results are segregated by school and/or function and are analyzed to determine the best way to work with these internal customers.
3.2c(2)	The organization uses data collected from student and other stakeholder groups in a variety of ways. Data have resulted in the addition of educational programming, offerings, and services and to enhance curriculum (e.g., the 1:1 laptop program, medical and health terminology course, virtual AP, 21st century skills, nonfiction writing, and critical thinking).
3.2b(1)	PSD determines student and stakeholder satisfaction and engagement through numerous surveys and the data influence programming (including the addition of a 4K program), showing linkage with strategy and work systems. This method identifies and enhances the organization’s relationship with its community.
3.2a(1)	The district utilizes end-of-year surveys to capture overall satisfaction from students, parents, teachers, and building support staff members. Additional surveys are conducted throughout the school year using email distribution lists, which can be segregated by school, grade, and activity. These surveys are used to obtain actionable information and feedback on educational programs, offerings, and stakeholder support.

Opportunities for Improvement:

Item reference	Description
3.2a(3)	PSD has initiated a suggestions and concerns pilot program, but it has not been deployed beyond the district office and no data have been aggregated. Aggregation and systematic analysis of complaints at lower levels and further deployment can help in continuous improvement and innovation.

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 57.

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	Pewaukee School District (PSD) keeps its performance measurement system current with education service needs and directions by reviewing it formally and informally a number of times every year. Participation by senior leaders in local, state, and national professional organizations and state- and national-level reporting requirements trigger some of these reviews. The creation of a data wall using the Fountas & Pinnell methodology is an example of rapid adaptation to keeping the measurement system current. This helps the district to remain sensitive to unexpected organizational and external changes. This is important for the organization to remain agile and make adjustments to its processes based on measurements.
4.1b,c	The district reviews organizational performance and capabilities continuously at Board of Education, Administrative Cabinet, Building Leadership Team, and department- and grade-level meetings. It also performs performance trend analysis and various other techniques to support reviews and to ensure that conclusions are valid. Every nine weeks each school and department reviews progress against target goals. The organization demonstrated through various examples how it responds rapidly to changing organizational needs and challenges in its operating environment.
4.1c	The organization uses various types of organizational performance reviews (OPR, Figure 4.1-2) to translate data into priorities for improvement and review. It has also recently deployed the I3 process to assist in translating findings into priorities. Relevant opportunities are deployed organization-wide including to suppliers, partners, and collaborators to ensure organizational alignment through monthly meetings, electronic communications, request for proposals, and face-to-face communications.

Opportunities for Improvement:

Item reference	Description
4.1a(2)	While the district uses a variety of key comparative data to measure its effectiveness, which includes information from state, national, peer, regional, and Baldrige recipient sources, few comparators to world-class organizations or best-in-class schools and educational institutions are used. While defined criteria are used to identify appropriate comparators including comparable enrollment and similar socioeconomic and demographic factors, in order to achieve its vision of providing world-class education, the district’s comparators need to be world-class in aspects related to its mission.

Item reference	Description
4.1a(1)	While the district uses a balanced scorecard and conducts an annual data retreat to review, analyze, and evaluate its key organizational performance measures, it has not adequately represented key short-term and longer-term budgetary and financial measures. One measure of organizational performance for a school is academic outcomes against financial cost of resources such as expenditure per student. This is important because the organization may have a gap in performance measurement that would impact its ability to deliver services in an efficient manner.

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, Knowledge, and Information Technology

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

Strengths:

Item reference	Description
4.2a(2)	PSD makes needed data and information available through a campus-wide network that includes servers, system applications, and a virtual private network. Data are made available to employees, students, parents, stakeholder groups, and suppliers as appropriate (Figure 4.2-2) by controlling their access rights, and selectively communicating to them through several methods including email. Management of access control is important to ensure that sensitive data is deployed appropriately to the right audience only. This is important because the organization has identified information management and transfer as critical to its mission.
4.2a(1)	The organization ensures accuracy, integrity and reliability, timeliness, security, and confidentiality of its organizational data, information, and knowledge through several methods (Figure 4.2-1). Systems deployed organization-wide, as well as to stakeholders, such as Skyward, use logic to detect and reject erroneous data. Data masks are used to improve reliability. Relevant, high-quality data are important for good decision making.
4.2b(3)	The district keeps its data and information availability mechanisms, including its software and hardware systems, current with education service needs and directions and with technological changes in its operating environment by planning for technology as part of its strategic planning process. In the development of this technology plan, PSD 1) solicits inputs from stakeholder groups, including both students and parents; 2) conducts forum discussions to elicit input on current and future technology needs and expectations; 3) operates a Technology Committee in each school that is responsible for making recommendations for technology improvements for instructional and communications purposes; and 4) encourages teacher leaders and information technology staff to attend regional, state, and national conferences to learn about current educational technology information and research-based practices and network with peers.
4.2b(1)	PSD ensures that its hardware and software are reliable, secure, and user-friendly through various approaches (Figure 4.2-3). The district has demonstrated that these approaches are systematically deployed to all stakeholders. The IT department periodically reviews several operational measures. Good use of user-friendly and reliable technology is important for the organization to realize its vision of providing world-class education. It is also important that systems remain available for active use by all stakeholders.

Opportunities for Improvement:

Item reference	Description
4.2a(3)	While the district systematically manages organizational knowledge to accomplish several requirements, as demonstrated by limited deployment of its Longitudinal Data Tracker (LDT), it has not demonstrated organization-wide deployment of these approaches. It is critical to deploy, review, and integrate these approaches in order to effectively collect and transfer workforce knowledge. Limited organizational knowledge sharing could adversely affect organizational decision making.

Item reference	Description
4.2a(3)	While the organization manages organizational knowledge to accomplish several key requirements, including the rapid identification of best practices, it does not systematically share and implement these best practices organization-wide. Systematic sharing and implementing best practices is critical to achieving excellence rapidly and ensuring that all organizational units benefit from key learnings in one part of the district.
4.2b(2)	While the district has demonstrated a systematic approach to ensuring the continued availability of data and information by storing them remotely at a supplier location, it does not have a plan to test this system periodically. Testing and review are critical to ensure that systems work as designed when needed. In addition, the plan does not address continued availability of hardware and software systems for all stakeholders in the event of an emergency.

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 **70–85** percentage range. Refer to Figure 2, “Criteria Scoring Guidelines (Process),” on page 57.

5.1 Workforce Engagement

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

Strengths:

Item reference	Description
5.1c(1)	A systematic process is in place to determine, attain and analyze workforce satisfaction. In a cycle of learning, improving on a survey used for ten years, the Human Resources department reviewed professional literature for benchmarking opportunities and worked with the Superintendent to include more specific questions on overall job satisfaction as impacted by commitment, communication, compensation, and benefits.
5.1a(2)	Pewaukee School District (PSD) fosters a mission-driven culture that is characterized by open communication, high-performance work, and an engaged workforce. There is a high level of trust among the Board of Education, senior leaders and the teaching staff that is evidenced in student achievement and the district’s continuous improvement efforts that focus on student learning.
5.1b	The organization has established a continuous learning and development system that addresses its core competencies and strategic challenges. Six specific areas are identified that offer a variety of opportunities for the workforce. By continuing to enhance the learning and development of its professional and support staff, PSD is able to sustain its strategic advantage of maintaining a talented and professional workforce and to meet the strategic challenges of acquiring 21 st -century teaching skills that in turn will increase student achievement.
5.1a(2,3)	The district fosters a culture that is characterized by high-performance work that is systematic and repeatable, resulting in improvement cycles over time. Examples include the district’s Performance Evaluation System (PES), improvement teams, and the strategic planning team, who work together for continuous improvement.
5.1	PSD’s task force, which is now researching an improved teacher evaluation process, demonstrates its commitment to open communication, high-performance work and an engaged workforce. Several practices, including peer coaching and reflective practice, have been piloted during the 2010 school year. These changes to the evaluations provide a focus on students, stakeholders, and the organization, which may allow the district to capitalize on its strategic advantages.

Opportunities for Improvement:

Item reference	Description
5.1a(1)	The organization segments distinct employee groups and uses the results of the annual survey on employee satisfaction; however, while teacher groups are further segmented to identify and meet their needs, other employee groups are not. Further segmentation regarding key requirements of these subgroups could reveal information and opportunities to positively affect levels of engagement.

Item reference	Description
5.1b(4)	Although the district has demonstrated its commitment to effective career progression for the entire workforce, succession planning now in place for senior leaders has not yet been extended to supervisory or leadership positions in all parts of the workforce. A well-deployed succession process will help ensure an engaged high performing workforce and reduce associated risks when personnel leave the organization.

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 has a structured staffing and budgeting process that encompasses rigorous and systematic recruitment, screening, and hiring steps using the Wisconsin Education Career Access Network (WECAN), the Gallup TeacherInsight online assessment, and multiple screening interviews involving many stakeholders. In addition the process is tracked and a recent cycle of improvement was made to the resume screening process. Extensive new hire training begins when the offer is made to the candidate, and engagement and satisfaction are determined at thirty- and ninety-day intervals. A mentor is assigned to each new teacher, and retention of new hires is tracked. During the current school year, an additional four in-service days were added for new staff.
5.2b	The district deploys comprehensive practices to ensure and improve workplace health, safety, and security for all employees. Staff wellness initiatives include health risk assessments and opportunities for staff members to engage in nutrition education through Weight Watchers as well as exercise programs. Regular safety training is provided to all staff members appropriate to their jobs, and workplace preparedness is ensured through the Emergency Response Team. The organization shows performance measures and improvement goals for each of these three areas (Figure 5.2-2).
5.2b(2)	The organization demonstrates support of its professional workforce by offering benefit packages to address key workforce satisfaction factors as well as using demographic data to tailor benefits to the needs of each workforce group. One example is the dental plan, which was re-negotiated to increase salary with no loss in dental benefits. Reflected in these benefit packages is the organization’s commitment to sustaining a talented and professional workforce.

Opportunities for Improvement:

Item reference	Description
5.1a(1,4)	In order to prepare the workforce for changing capability and capacity needs, the organization may consider assessing current skills, not only in the teaching staff, but in the entire workforce. Expanding or learning new skill sets can help the district ensure continuity or minimize the impact of workforce reduction if needed in the future.
5.2	A large group of volunteers provides important services to the teaching staff. Although training occurs with the individual classroom teacher that a particular volunteer supports, no process is in place to identify volunteer needs or to provide district training that might include common expectations. The voice of this key support group, if addressed, could enhance the mission of the organization as well as ensure sustained and valuable support. Volunteers are a part of the workforce and their development is essential to realize their full potential.
5.2b(1)	Although the Safety Committee has met high standards in areas of health, safety and security, no segmentation is done to determine the impact of environmental factors for different workforce groups. Addressing the specific safety needs of different workforce groups may better address the strategic challenges of the organization.

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 **70–85** percentage range. Refer to Figure 2, “Criteria Scoring Guidelines (Process),” on page 57.

6.1 Work Systems

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

Strengths:

Item reference	Description
6.1a(1)	Pewaukee School District (PSD) has organized its work systems into two different categories: academic, with four learning-centered work processes, and non-academic, which houses six support services (Figures 6.1-1 and 6.1-2). Continuous improvement plans (CIP) have been developed and fully deployed for all four academic areas, and dashboards have been developed and deployed for all non-academic areas. There is evidence of refinement and data to drive improvement in both academic and non-academic areas. This is important because it clearly identifies the different work systems and ensures that everyone at every level understands his or her role in the organization’s success. It also identifies clearly expected outcomes for each area based upon that area’s responsibilities to improve overall organizational performance.
6.1a(1)	The district decides which work system processes will remain internal and for which they will use external resources by for looking at the overall capacity and skill sets of the non-instructional workforce within a department. A cost/benefit analysis and risk analysis are developed while also determining the viability of managing the outsourced service. No mission-critical, learning-centered processes are considered for outsourcing.
6.1b(1)	PSD has identified the four key academic work processes that contribute to student learning and success (Figure 6.1-1). The Curriculum Assessment Renewal Cycle (CARC) ensures the development of a curriculum and assessments that meet state standards, and the curriculum is approved by the Board of Education. Students’ proficiency is benchmarked against federal, state, and district performance standards and assessed through formative and summative assessments. Those assessments inform the Curriculum and Instruction division to develop PDSA improvement plans.
6.1b(2)	The organization uses information from student segments and individual students in its yearly data retreat. Analysis of this segmented data informs strategic planning initiatives and work systems. PSD has made programmatic changes, staffing additions, staffing moves, and determined professional development needs from this analysis. The use of real time measures of academic process (MAP) data also allows the district to quickly identify and address student specific needs.
6.1a(2)	Key work processes and work systems (Figures 6.1-1 and 6.1-2) capitalize on PSD’s core competencies (Figure P-1) through the use of strategic planning goals (Figure 2.1-2) and action plans (Figure 2.1-8). Strategic planning goals and CIPs are deployed across the system and capitalize on core competencies through the sharing of intellectual and physical resources, contractual services, communication, and deployment of resources.

Opportunities for Improvement:

Item reference	Description
6.1b(2)	PSD seeks volunteer input from students and key stakeholders to determine key work process requirements; however, if volunteers from a key stakeholder group do not step forward, the process continues without their input. This approach limits the diversity of views needed to determine key work process requirements.
6.1b(2)	The Pyramid of Intervention (POI), used to address individual differences in student learning capabilities, rates and styles, is well defined at both the elementary and middle school levels but lacks definition at the high school level. 80 to 85% of student needs can be met in the classroom; however consistent indicators for students to receive POI services at different levels have not been defined. Transmission of consistent POI data to the next level will guide staff members in determining the most effective interventions for each child.

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 Processes

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

Strengths:

Item reference	Description
6.2a	PSD designs and innovates its work processes to meet all key requirements by using PDSA improvement cycles (Figure 6.2-1). This process is evident in both academic and non-academic areas and well deployed within the Administrative Cabinet and the Administrative Team. The district is beginning to deploy the PDSA process to teaching and support staff members so that the process can be deployed and integrated across the system for improved organizational learning.
6.2b(2)	The district prevents variability in student learning by the use of a single, prescribed curriculum adopted by the Board of Education that contains course power standards and core competencies with required common assessments. PSD has a systematic approach for ensuring the use of common assessments that is well deployed as evidenced by interviews and walkaround conversations during the Examiner site visit. The district uses data to assess effectiveness of curriculum delivery, and some learning is shared.
6.2c	The organization improves its work processes to maximize student success, improve educational offerings and services, and keep current with educational needs and directions by using the strategic planning process, which integrates strategically implemented process tools. The CIP process examines data, reviews processes, and establishes key improvement goals. The Quality Assurance Report (QAR) process provides frequent checkpoints, and plans are adjusted as needed. Dashboards provide real-time data to assist in making day-to-day decisions in non-academic work systems while aggregating data to look for trends over time.
6.2b(2)	PSD manages the work process implementation to ensure that design requirements are met by having the Administrative Team monitor the leading and lagging indicators predetermined in step 6 of the strategic planning and identified during strategic planning as key indicators for goal attainment. PSD also systematically uses the PDSA process throughout the organization to design and innovate work processes to meet key requirements and to mitigate variability.
6.2b(2)	The district prevents variability in the implementation of non-academic work processes by the use of real-time dashboards. Dashboards have developed into a process that allows for both short- and long-term innovations and improvements to be made.

Opportunities for Improvement:

Item reference	Description
6.2c	Learning and process improvements are shared within small Professional Learning Communities (PLC), and new learning is posted to the intranet within PLC minutes; however, staff members indicate that they are not using this resource to find new learning and process improvements from other areas, grade levels, or departments. Without full deployment of this approach to share new learning and process improvements, the ability to consistently develop staff members and improve key processes may be limited.

Item reference	Description
6.2b(2)	<p>While the district prevents rework by utilizing the Pyramid of Interventions when students have not successfully mastered the curriculum, and the POI process is well defined to encompass between 5 and 15% of the students with classroom differentiation of the curriculum as the foundation of the Pyramid, staff members indicated during the Examiner site visit that there is not a systematic process for the identification of students or in the intervention that would be used. Principals indicated a need to be more systematic in keeping data about the effectiveness of the intervention and a system to share that information with students' future teachers. Systematic deployment is important so that teachers do not need to recreate interventions and so that all students get the assistance needed to be successful.</p>

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 **50–65** percentage range. Refer to Figure 3, “Criteria Scoring Guidelines (Results),” on page 58.

7.1 Student Learning Outcomes

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

Strengths:

Item reference	Description
7.1a(1)	Levels and comparisons are favorable for most 4 th , 8 th , and 10 th grade assessments. Outcomes from the 2004–2005 school year through 2009–2010 (Figures 7.1-1 through Figure 7.1-6) compare favorably to state averages and are approaching county levels and the top five state performers. Relatively stable trends are evident. These results are linked to the district’s vision, strategy, and principal success factors.
7.1a(1)	Levels and comparisons are favorable for AP exam participation (Figure 7.1-8), AP scores (Figure 7.1-9), ACT scores (Figure 7.1-10), and graduates attending college (Figure 7.1-18). Outcomes from 2005 through 2008 compare favorably to state averages and Baldrige winners, and are approaching county and the top five state performers. AP exam participation has trended positively over four years from about 9% of students taking exams in 2005 to about 16% in 2008, and those students scoring 3 or higher have increased from 77% to 80% over the same period.
7.1a(1)	Despite one of the highest credit requirements for graduation in the state of Wisconsin (28), PSD has achieved a graduation rate approaching 100% and above all four comparable groups (Figure 7.1-12). Trends are favorable for the last three years of results, and comparators include Baldrige-winning, county, state and the top five Wisconsin schools.
7.1a(1)	Total failures (Figure 7.1-14) have been reduced 40% from 2005–2006 to the current school year. Failure rate was identified as a continuous improvement plan priority four years ago and the results demonstrate significant progress towards this goal.

Opportunities for Improvement:

Item reference	Description
7.1a(1)	The district has been losing ground to county competitors each school year since 2004–2005 in WKCE grade 10 reading and math (Figures 7.1-5 and 7.1-6). Overall results for college readiness (Figure 7.1-18) have been below county comparators each year since 2005–2006. The district has conducted a gap analysis on the math practice and is taking steps towards improvement and has been implementing action plans to improve college readiness through an ACT preparation course, a literary coach, and a school counselor program (Pirate Talks) that charts out a four-year academic achievement plan with students.
7.1a(1)	A mixed and generally unfavorable trend exists in the percentage of females proficient in reading (Figure 7.1-7) since the 2005–2006 school year, accompanied by a slight decline in the male score since 2007. The district has conducted analysis but has not determined the cause for this variability, which is outside their defined range of 3% year-over-year significance. This is important because losses here will affect success of students and could impact PSD’s ability to achieve its vision that all students meet or exceed performance expectations.

Item reference	Description
7.1a(1)	The district uses the term “world class” in reference to the five highest performing schools in Wisconsin and therefore has a smaller effective subset of comparators than a true world-class comparison would entail. This practice may limit the organization’s ability to understand how it compares to high-performing schools outside the state and negatively impact its vision to offer a truly world class education.
7.1a(1)	Although the district has taken numerous steps to improve college readiness, students scoring 3 or better on AP exams (Figure 7.1-9), ACT composite scores (Figure 7.1-10), and graduates attending college (Figure 7.1-18) show no clear trend over the last four years.

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 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 Customer-Focused Outcomes

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

Strengths:

Item reference	Description
7.2a(1)	Stakeholder perception of the district is favorable compared to national benchmarks. Parent perception of principal and school communication meet and exceed national benchmarks (Figures 7.2-1, 7.2-2, and 7.2-6). Overall student satisfaction (Figure 7.2-5) has outperformed the national benchmark since the 2006–2007 school year.
7.2a(2)	Student and stakeholder engagement results (Figures 7.2-10 through 7.2-14) compare favorably to state schools and Baldrige schools where comparisons are made, and where comparisons are not available, trends are positive.
7.2a(2)	PSD is successful in communicating with and engaging stakeholders (Figures 7.2-1 and 7.2-2, 7.2-10 through 7.2-12, 7.2-13, and 7.2-14) as evidenced by favorable trends over time. The ability to effectively engage stakeholders supports the value of fostering positive citizenship and addresses the strategic challenge of maintaining and growing support and partnerships in the community.
7.2a(1)	Parent and student satisfaction (Figures 7.2-1 through 7.2-8) compares favorably to national benchmarks. Nearly all trends have been favorable or stable since 2005 or 2006. Data are segregated by school. Alumni perception data (Figure 7.2-9) show results on subjects according to quality and importance that compare favorably to benchmarked schools of similar size in 20 of 24 categories. This links to a key stakeholder group, and these data were used to identify a need to further develop the world language curriculum.

Opportunities for Improvement:

Item reference	Description
7.2a(1,2)	In general, the district does not segment its student or parent satisfaction results beyond school, although Asa Clark Middle School also segments results by grade and gender. Community satisfaction data have minimal segmentation by subgroups. These limitations on segmentation may restrict the ability to fully analyze and leverage these survey results.
7.2a	The district in the very early stages of implementation of a customer complaint tracking system and the associated data analysis. Because community perception and relationship building are key to achieving the district’s mission and vision, the lack of a comprehensive complaint data is a significant gap.
7.2a(1)	The organization may not be reaching all stakeholders in its communication plan. Although community survey rankings of letter grade A and B exceed the national benchmark, 13% of respondents indicated “no opinion,” which is significantly higher than national average (Figure 7.2-8). A large segment of the community may feel too uninformed or out-of-touch to rate the school district.
7.2	Middle school parent perceptions of being listened to have dropped over the last three years (Figures 7.2-1 and 7.2-2). Maintaining high levels of parent engagement will assist the district in leveraging its strategic advantage of growing enrollment and support its value of positive citizenship.

Item reference	Description
7.2a	Although comparative data have proved difficult to come by in some cases, comparisons of student and stakeholder satisfaction to immediate competition (both private and public schools) are important in order to determine whether the district's goals are appropriate to meet the vision of becoming world-class. Without clear comparisons, it is difficult to evaluate how the district is progressing toward its goals.

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 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 **50–65** percentage range.

Strengths:

Item reference	Description
7.3a(1)	Fund balance (Figures 7.3-1 and 7.3-2) surpassed goal of 10% for six consecutive years and is approaching the goal of 12%, and declined only because of planned 4K startup. A budget surplus existed for nine consecutive reporting years (Figure 7.3-3), and plans are in place to restore a yearly positive surplus in 2012. These data reflect a focus on the key challenge of maintaining financial stability.
7.3a(2)	Market performance results (Figures 7.3-5 and 7.3-6) show strong levels of resident and open enrollment, retaining and bringing in a high number of students. Overall positive trends are seen, with strong performance relative to competition.
7.3a(1)	The district spends fewer instructional dollars per pupil (Figure 7.3-4) than other similar districts and than the state as a whole, with a rate of growth roughly consistent with inflation. Results are below the state CESA #1 comparator for all years provided.

Opportunities for Improvement:

Item reference	Description
7.3a(1)	Though the organization uses some comparators (state average, southeaster Wisconsin schools, and local competitors), no comparators to world-class organizations are used for budgetary, financial and market comparisons. Recognizing that local funding decisions make many comparisons less relevant, the district may find it difficult to fully assess its position in the market and appropriately address its financial and competitive challenges without finding additional comparators.
7.3a(1)	The district demonstrates overall fiscal health, but gaps exist in that there are no aggregate measures of cost containment or operational savings. This may make it more difficult to ensure that long-term fiscal health is maintained.
7.3a(2)	Although open enrollment projections are analyzed and tracked at a district level, other market factors such as private, parochial, and home school trends are only tracked at the building level. This may limit the organization’s ability to fully understand its changing position in the market.

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 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 **50–65** percentage range.

Strengths:

Item reference	Description
7.4a(2)	Advanced skills for certified staff show high levels of performance relative to comparators. Master-degreed teaching staff levels exceeded both national and state comparators from 2005 to 2009 (Figure 7.4-6). Technology proficiency ratings for certified staff members show high ratings in spreadsheet, word-processing, and multimedia skills (Figure 7.4-7). Advanced degrees are important because they support the strategic advantage of a talented and professional workforce, and high levels of certified staff proficiency in technology skills contribute to addressing the strategic challenge of teaching 21 st century skills.
7.4a(3)	The student-to-staff ratio (Figure 7.4-8) is significantly lower than state and national comparators. This may result in more face time between staff and students, and it leverages the strategic advantages of a talented and professional workforce with high student achievement.
7.4a(1)	Employee satisfaction survey results (Figures 7.4-1 and 7.4-2) show strong satisfaction in most responses, with top-box levels in three out of five measures of employee satisfaction rating over 50%, including overall job satisfaction, commitment to a long-term career, and likelihood to refer a friend to PSD as a place to work. Results are segmented for each school in the district.
7.4a(4)	Workers Compensation claims (Figure 7.4-13) have been sustained well below the US education benchmark since at least 2003, and the district's OSHA rating (Figure 7.4-14) both shows a favorable trend since 2005 and is currently below the US education benchmark.

Opportunities for Improvement:

Item reference	Description
7.4	Several measures lack comparative data (Figures 7.4-1, 7.4-2, 7.4-7, 7.4-9, 7.4-11, and 7.4-14), and the comparator for median years of service (Figure 7.4-3) is ten years old, since which job market trends are likely to have changed. There are no comparative results for continuing education (Figure 7.4-6) for teachers of key competitors. Generally, when comparators are used they tend to be state or national averages, not competitors or best-in-class levels. It may be difficult for the district to fully assess its position in the industry, appropriately address its performance and competitive challenges, and achieve its world class vision.
7.4a(2)	There are no results for leadership development for current Administrative Team (AT) members or for the development of teacher-leaders and teachers who aspire to be administrators. Providing measurable opportunities to acquire and augment leadership skills within the AT and for teachers may provide a basis for succession plans and support organizational sustainability.
7.4a(1)	There are no results related to employee satisfaction that are segmented beyond the school level. There is also no segmentation by workforce groups—teachers, paraprofessionals, principals, administrators, custodian/maintenance, food service, and clerical staff members. Understanding satisfaction data for workforce groups with different factors may yield opportunities for indicators of workforce capacity and capability needs to meet changes in strategic directions.

Item reference	Description
7.4a(1)	The employee satisfaction survey does not go beyond measuring satisfaction to measuring engagement, nor are there many other measures of engagement of the workforce. Without measurements to determine whether or not its workforce is deeply engaged, the district may be moving forward on faulty assumptions.

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 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 **50–65** percentage range.

Strengths:

Item reference	Description
7.5a(1,2)	Favorable operational performance results that contribute to student learning and organizational effectiveness indicate that PSD is meeting its goals in nonacademic areas defined as crucial (Figures 7.5-1 through 7.5-12). These results foster the district’s mission and results focus within its culture of continuous improvement.
7.5a(1)	Results related to human resource processes are strong, including results for timely performance appraisals and days to fill vacancies (Figures 7.5-1 and 7.5-2). Human resource processes that yield strong results help the district to leverage its principal success factor of maintaining a high-quality staff with few staff reductions.
7.5a(2)	Key results related to technology work processes are favorable, including core server uptime (Figure 7.5-3), customer service satisfaction (Figure 7.5-8), response time for incident resolution (Figure 7.5-6), and total outstanding incidents (Figure 7.5-7). Technology work processes that yield strong results help the district to leverage its strategic advantage of maintaining innovation in academic program and use of technology and achieve its vision of preparing students to compete in a global environment in the 21 st century.
7.5a(2)	Food service participation and profitability measures show favorable trends (Figures 7.5-10 and 7.5-11) that support a dedication to customer satisfaction while promoting economic stability through systematic operational systems. Food service processes that yield strong results help the district to maintain budget stability as well as the satisfaction of key stakeholder groups of student and parents.

Opportunities for Improvement:

Item reference	Description
7.5a	There are no comparative data for teacher hiring time (Figure 7.5-2), core service uptime (Figure 7.5-3), incident resolution (Figure 7.5-6), customer service satisfaction (Figure 7.5-8), food service profitability (Figure 7.5-11), or bus departure times (Figure 7.5-12). A lack of comparative data may make it difficult for the district to fully assess its position in the market and appropriately address its competitive challenges.
7.5a	Segmented results by programs and offerings, student and market segments, suppliers and partners, and processes and locations are not presented for most outcomes. The lack of segmented results may hinder efforts to maximize operational performance within a culture of continuous improvement.
7.5a	While outcome measures are provided, no in-process measures of efficiency or effectiveness are shown for two key work systems: the Pyramid of Interventions and the Curriculum Assessment Renewal Cycle. Without leading indicators of these two key work systems, the district may not know of problematic trends until outcome measures are calculated. This delay may result in delayed responses in the district’s most important key student- and curriculum-focused work systems.

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 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 **70–85** percentage range.

Strengths:

Item reference	Description
7.6a(2)	Most key governance, fiscal, regulatory, safety, accreditation, and legal accountability outcomes are positive and comprehensive (Figure 7.6-4). Results have shown positive trends since 2004. Audit reports show relevant practices with no outstanding safety violations or pending litigation, and fiscal accountability is high, both internally and externally. A high bond rating by Moody's supports stakeholder trust.
7.6a(1)	Favorable results in the accomplishment of action plans tied to strategic plans demonstrate a commitment to organizational strategy. Action plan completion levels (Figure 7.6-1) have increased steadily since the 2004–2005 school year, and 96% of action plans were completed in the 2008–2009 school year. Evidence of various innovations exists for ten 10 key work processes (Figure 7.6-2). These results link to the culture of continuous improvement.
7.6a(5)	Community support and stewardship of the environment through numerous activities and programs show exceptionally strong performances. Senior leaders show increasing levels of community giving with time and talent (Figure 7.6-11), with about 1,350 volunteer hours donated during the 2008–2009 school year. These results support the strategic challenge of maintaining and growing support and partnership with community.
7.6a(2,3)	Results for most measures of systematic processes for measuring ethical responsibility (Figure 1.2-4) are listed in Figure 7.6-4, and in most instances where a goal is indicated, the results compare favorably and may be potential benchmarks for other districts. Key governance measures address all stakeholders groups including the Board of Education, senior leaders, citizens, employees, and students. Measures are integrated to major governance processes such as ethics monitoring, planning and communication. Most results have been tracked for five years. Additionally, the auditor's report consistently finds PSD in compliance with relevant accounting practices, and the district is in regulatory compliance with all agencies with no outstanding safety violations or pending litigation. The organization has maintained fiscal stability through innovative programs and community support.
7.6a(3)	Results for safety and legal compliance (open meetings laws, election laws, the harassment policy, HIPAA, criminal background checks, IRS violations, No Child Left Behind compliance, kitchen inspections, safety drills, accidents, instructional time, safety training, and litigation) show positive levels and trends and demonstrate compliance to major regulatory bodies and laws. OSHA accident reports have decreased over the last 3 years (Figure 7.6-4).

Opportunities for Improvement:

Item reference	Description
7.6a	Comparative data are not presented for community survey results, alumni survey results, societal commitments, campus usage, United Way donations, and many key governance, fiscal, regulatory, safety, accreditation, and legal compliance processes. While it may be difficult to obtain these data from other school districts, the district may wish to look outside of education for comparators. Obtaining meaningful comparators may assist the organization in determining if its levels are strong enough to support its missions and values.

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 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.

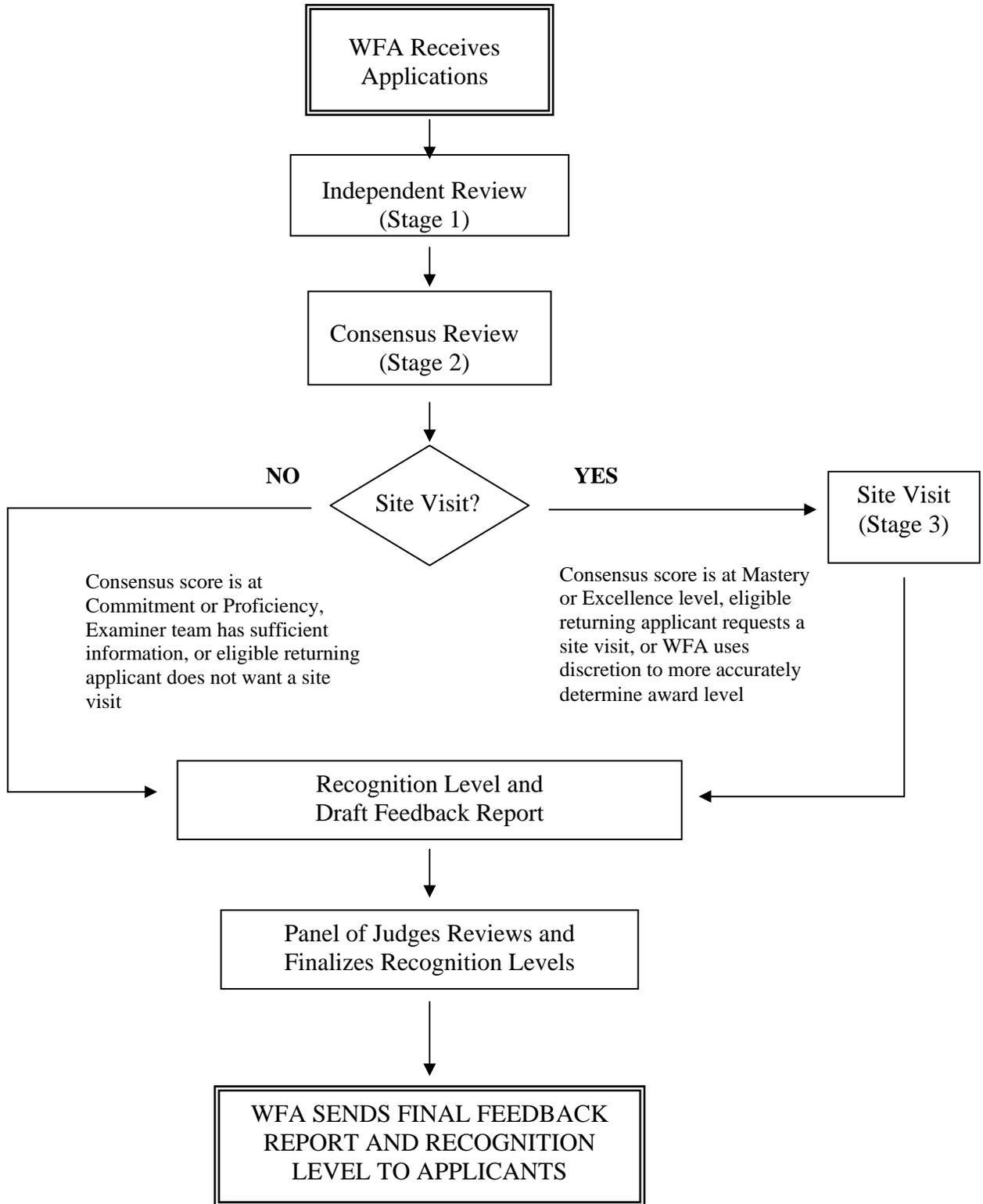
The process began with an *independent review (Stage 1)*. During this stage, several members of the Wisconsin Forward Award Board of Examiners, including a Team Leader and a mix of Examiners, were assigned to each of the applications under review. Examiner assignments were made to ensure no conflict 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. 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%	<ul style="list-style-type: none"> ▪ No systematic approach to Item requirements is evident; information is anecdotal. (A) ▪ Little or no deployment of any systematic approach is evident (D) ▪ An improvement orientation is not evident; improvement is achieved through reacting to problems (L) ▪ No organizational alignment is evident; individual areas or work units operate independently. (I)
10%, 15%, 20%, or 25%	<ul style="list-style-type: none"> ▪ The beginning of a systematic approach to the basic requirements of the Item is evident. (A) ▪ 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) ▪ Early stages of a transition from reacting to problems to a general improvement orientation are evident. (L) ▪ The approach is aligned with other areas or work units largely through joint problem solving. (I)
30%, 35%, 40%, or 45%	<ul style="list-style-type: none"> ▪ An effective, systematic approach, responsive to the basic requirements of the Item, is evident. (A) ▪ The approach is deployed, although some areas or work units are in early stages of deployment. (D) ▪ The beginning of a systematic approach to evaluation and improvement of key processes is evident. (L) ▪ 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%	<ul style="list-style-type: none"> ▪ An effective, systematic approach, responsive to the overall requirements of the Item, is evident. (A) ▪ The approach is well deployed, although deployment may vary in some areas or work units. (D) ▪ 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) ▪ The approach is aligned with your organizational needs identified in the Organizational Profile and other Process Items. (I)
70%, 75%, 80%, or 85%	<ul style="list-style-type: none"> ▪ An effective, systematic approach, responsive to the multiple requirements of the item, is evident. (A) ▪ The approach is well deployed, with no significant gaps. (D) ▪ 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) ▪ The approach is integrated with your organizational needs identified in response to the Organizational Profile and other Process Items. (I)
90%, 95% or 100%	<ul style="list-style-type: none"> ▪ An effective, systematic approach, fully responsive to the multiple requirements of the Item, is evident. (A) ▪ The approach is fully deployed without significant weaknesses or gaps in any areas or work units. (D) ▪ 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) ▪ 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%	<ul style="list-style-type: none"> ▪ There are no organizational performance results or poor results in areas reported. ▪ Trend data are either not reported or show mainly adverse trends. ▪ Comparative information is not reported. ▪ Results are not reported for any areas of importance to your organization’s key mission or business requirements.
10%, 15%, 20%, or 25%	<ul style="list-style-type: none"> ▪ A few business results are reported; there are some improvements and/or early good performance levels in a few areas. ▪ Little or no trend data are reported, or many of the trends shown are adverse. ▪ Little or no comparative information is reported. ▪ Results are reported for a few areas of importance to your organization’s key mission or business requirements.
30%, 35%, 40%, or 45%	<ul style="list-style-type: none"> ▪ Improvements and/or good performance levels are reported in many areas addressed in the Item requirements. ▪ Early stages of developing trends are evident. ▪ Early stages of obtaining comparative information are evident. ▪ Results are reported for many areas of importance to your organization’s key mission or business requirements.
50%, 55%, 60%, or 65%	<ul style="list-style-type: none"> ▪ Improvement trends and/or good performance levels are reported for most areas addressed in the Item requirements. ▪ 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. ▪ Some trends and/or current performance levels—evaluated against relevant comparisons and/or benchmarks—show areas of good to very good relative performance. ▪ Organizational performance results address most key customer, market, and process requirements.
70%, 75%, 80%, or 85%	<ul style="list-style-type: none"> ▪ Current performance is good to excellent in areas of importance to the Item requirements. ▪ Most improvement trends and/or current performance levels have been sustained over time. ▪ 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. ▪ Organizational performance results address most key customer, market, process, and action plan requirements.
90%, 95% or 100%	<ul style="list-style-type: none"> ▪ Current performance is excellent in most areas of importance to the Item requirements. ▪ Excellent improvement trends and/or consistently excellent performance levels are reported in most areas. ▪ Evidence of industry and benchmark leadership is demonstrated in many areas. ▪ 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	4.29%	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 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	19.0%	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 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	30.7%	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 163 applications evaluated over a thirteen-year period (1998–2010).

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	28.2%	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 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	9.20%	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 163 applications evaluated over a thirteen-year period (1998–2010).

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	8.59%	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.	<p>Excellence</p> <p>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.</p>
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 163 applications evaluated over a thirteen-year period (1998–2010).

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