Leadership Accountability
A Story of Benchmarking and Borrowing Across Industries

Charles Korbell and Laura Longmire

While working with the key senior leaders of public school districts, I have found that these instructional leaders are held accountable by a complex network of stakeholders, yet they have little to no tools for leadership accountability. Superintendents are formally assessed by their school boards, but personal accountability is many times not based on data or facts. Districts and schools must meet federal and state standards for accountability but research states that high performing systems are determined by the effectiveness of their senior leaders. Knowing this research-based fact, I have been sharing a tool that the senior leaders of a TAPE and Baldrige winning organization use for assessing its leaders effectiveness and holding them accountable. This tool is known as the "leadership report card."

The idea for this tool came after a benchmarking visit by the senior leaders of Clarke American met with and shared best practices of leadership with the Ames Rubber Company senior leadership team. The leaders at Ames had a simple scorecard of indicators they used monthly to monitor the performance of the organization. From this simple scorecard, Clarke American leader's adapted a scorecard to measure the key characteristics of effective leadership. The ten elements that were measured were:

Professional Development Hours	*Community Involvement*
360 Degree Performance Reviews	*Effective Partner Visits*
Effective Supplier Visits	*Executive Team Sponsorship*
Associate Satisfaction	**Associate FIS Communications*
Site Visits	*Customer/Supplier Agreements*

For each of these elements, there were measures of success and some very aggressive targets. Scorecards were updated monthly and posted outside of all the leaders' offices to ensure the reliability of the data. The individual leader's scorecard was submitted to the President/CEO monthly for review. The President scored the report card to a rubric (criteria), and the report card would receive an "A, B, C…" If a leader received a "C" or below, they had to submit an action plan for how they would improve their performance. Effectively, senior leaders were being held accountable for "walking the talk" of the core values/beliefs, receiving monthly performance reviews, and aligning their personal actions to the achievement of the organization's strategic objectives and balanced scorecard. The senior leaders functioned as a high performing team, but individually they were very competitive. It didn't take long till all the senior leaders had all "A's" and the targets had to be reset based on the highest level of attained performance.

The leadership report card was linked to the leadership system. Clarke American leaders believed that the leadership behaviors must be based on the strategic needs of the company, and the leaders "priorities" are where your feet are. Leaders were the visual role models for Clarke American. Leadership behavior was critical to make the changes necessary to achieve the stretch targets and goals. Employees (associates) would only believe the leaders if they could see the leaders visibly "walking the talk."

Leadership Score Card 2000

SCORE CARD ELEMENTS	Point Value	1st Jan	Feb	Mar	2nd Apr	May	June	3rd July	Aug	Sept	4th Oct	Nov	Dec	Score
LEADERSHIP • Classes (FIS panel) • FIS Meetings • Fitness Review • Texas Quality Award • Quality Training (Baldrige, etc.) • Implemented ideas	10													
STRATEGY DEPLOYMENT • Goal Deployment Leadership • Sponsor Key Company Project/ Category Team/Team Excellence • Set Goals and Review KPIs Quarterly • Demonstrated Company Value Deployment	10													
CUSTOMER FOCUS • Partner Visits • Partner Goal Meetings • Customer/Supplier Agreements • Demonstration of Closed Loop in Process/Division • Other	15													
ASSOCIATES • Plant/Center Visits-min 1/2 day; 3/yr • Associate Club Events (2) • 2 Action Items to Improve Associate Satisfaction • Recognition Events/Actions • Safety required training 100% assoc. • Other	15													
HUMAN RESOURCES • OMDR Coaching • Orientation Classes • Direct Reports Performance Appraisals/PDPs • Recruitment of High Caliber Associates/Above Average	10													

Leadership Score Card 2000

SCORE CARD ELEMENTS	Point Value	1st Jan	Feb	Mar	2nd Apr	May	June	3rd July	Aug	Sept	4th Oct	Nov	Dec	Score
SUPPLIERS (2 Key Suppliers Annually) • Conference • Goal Meetings • Location Tours and Value Management • Category Management • Other	5													
QUALITY BENCHMARKING • Competitor/Industry KPI Comparison • World Class Benchmark • Other	5													
COMMUNITY (2 Events) • Participation in Company Events • Leadership of Event/Function • Board Participation • Other	10													
SELF-DEVELOPMENT • ServiceLine Plus Training • InTouch Messaging Training • Completed (1) PDP/(2) 360° Action Items • Other Outside Learning	10													
PERSONAL TIME • Quality of Vacation Time (Schedule) • Designated Acting Manager	10													
EXTRA POINTS • Other	TBD													

Some superintendents of large urban public school districts have seen this leadership scorecard and again adapted it to themselves and their cabinet members. This adaptation makes this benchmarking study a second generation of applied best practices. With the superintendent's adaptation, the key elements of effective leadership are:

Professional Development Hours   *Community Involvement*

Performance Evaluations   *Effective Site Visits*

Informal Communication Meetings   *Goals/Cycles of Review*

Recognition Events   *Stakeholder Meetings*

Benchmarking

The characteristics for effective leaders are not very different from business leaders, but there are some significant adaptations.   Similar measures of effective leaders in any business segment are those that measure being a life-long learner and acquiring new skills, giving back to the community in which you serve, giving effective employee performance reviews on-time, visiting all the sites/schools that are your responsibility, holding regular meetings to set expectations and review progress, and recognizing and rewarding employees. Superintendents and cabinet leaders are very busy people, and they support very complex stakeholder groups. Yet by measuring a few key performance indicators, the leadership of the district will yield high performing positive results for all the stakeholders.

There are some other key performance indicators for effective leaders in public education (maybe transferable to other business segments, too!) Superintendents and cabinet leaders need to be very visible leaders. Hence, effective site visits is a critical measurement for accountability. An effective site visit will have a rubric for discussions with school leaders, observing classroom instruction, and walking the school perimeter to ensure safety, security, and building maintenance. Before leaving a site, the key leader will give positive feedback and suggestions to the instructional leaders. A key lesson learned from business is, if the superintendent or cabinet leader *"sets an expectation",* it will not happen until the leader *"inspects the expectation."* Remember the leadership report card at Clarke American only took two months till all the leaders had all "A's" was due to the closing of the loop with follow-through after setting the expectations.

Another key performance indicator for educational leaders is the consistent cycles of review. This is at the minimum a quarterly scorecard review of the district's strategic objectives and goals. Here in Texas, Aldine ISD and Mesquite ISD use the quarterly scorecard reviews to monitor and make course corrections of their improvement plans. Each indicator of success is "owned" by one of the cabinet members. All senior leaders' annual performance evaluations are aligned and linked to the district's key performance indicators. While both of these districts "inspect what they expect", they learned this capability by benchmarking with other TAPE and Baldrige winning organizations.

The final key performance indicator in the educational leader's report card is "benchmarking." Being a senior leader of any organization is a lonely and challenging position. So how does a senior leader develop better leadership skills? They research leadership best practices and then "benchmark" these best practices. Once they find effective skills and practices, each leader will have a choice to adopt, adapt, or create the next generation skill. Benchmarking to learn effective leadership skills and practices is not a new quality tool but one of the most effective tools used by the senior leaders of all of the TAPE and Baldrige winners.

To gain the most from effective benchmarking, leaders should benchmark outside of their industry. Learning from high performing organizations will really "stretch" the current leadership skills and bring innovative ideas into the district. This type of benchmarking is known as strategic benchmarking. Strategic benchmarking is most effective when all leaders go together to see and learn about the best practices used by other leaders. It is less difficult to deny the findings of the leadership practices when all the leaders see them at the same time. To provide impact or change after benchmarking, all leaders must agree on what they will "adopt, adapt, or redesign" for implementation as a result of their benchmarking study. Both Aldine ISD and Mesquite ISD attend the annual Quest for Excellence where they can learn about leadership best practices of award winning organizations.

 *FIS-First in Service (total quality program)