



THE CHIEF PERFORMANCE OFFICER IN EDUCATION

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The Question

Several states have established a Chief Performance Officer position to assist the Chief in improving performance management. How does establishing the role of a Chief Performance Officer assist the Chief State School Officer in driving continuous improvement within the state agency?

What is Performance Management?

Performance management is a strategic approach to improvement in which the entire organization shares the same set of objectives.

Why Performance Management?

A performance management system can help the state education agency (SEA) become more intentional about what it does and does not do, how work is done, and when to change course. Performance management does not define goals or identify specific strategies, but it puts in place systems that enable learning and adaptation to drive improvement and the achievement of goals.¹ In organizations working toward multiple objectives, as is the case with SEAs, performance management supports the alignment of work so as to better advance strategic goals.

Performance management is often equated with assessment and reporting. But the continuous improvement promised by performance management can only be achieved if performance data are used to diagnose problems (and opportunities), as well as to make hard choices about whether existing investments are worth continuing, expanding, or terminating altogether.² Importantly, performance management is not the same as accountability, though holding agents responsible for outcomes is one component of a performance management system.

¹ Garvin, D. A. (1993). Building a learning organization. *Harvard Business Review*, 71(4).

² Duck, J.D., (1993). Managing change: The art of balancing. *Harvard Business Review*, 71(6).



Performance management systems are built with the understanding that the people closest to a problem are best positioned to solve it and that they need flexibility to seek alternative solutions.³ The biggest potential gains in productivity and performance will sometimes require disruptive changes, and everyone in the system must be able to explore and share innovation.⁴

An organization using performance management considers unique circumstances and evidence of improvement, as well as absolute performance levels. But in dealing with lower performers it is always driven by the question, “is a different approach likely to lead to better results?” In order to leverage the tools of performance management to support school improvement, SEAs will need to reconceive their diverse and sometimes diffuse activities as a collective enterprise in service of shared strategic objectives. Doing so is likely to require SEAs to draw upon new people, expertise, and organizational capacities. Translating performance management into the context of the SEA will result in:

- Goal-oriented program administration that aligns compliance and school improvement objectives.
- Standards, assessment, and accountability systems that link achievement and financial outcomes.
- Strategies to bolster district capacity to improve weak schools and programs.
- Capacity and will to terminate ineffective programs and intervene directly in persistently low-achieving schools.
- System that facilitates the development, evaluation, and dissemination of new tools and models to support innovation in educational practice.

As SEAs move from monitoring compliance to managing performance, many are exploring new organizational structures. Prominent among them is the creation of a new role, the Chief Performance Officer (or a similar title), a person who works across functional and programmatic lines to assure that state resources are deployed in the most effective possible manner.

What Does a Chief Performance Officer Do?

The Chief Performance Officer’s (CPO) role is to constantly evaluate the program mix and efficacy of various approaches scaling up the most effective, mobilizing existing support systems

³ This conforms to the notion of “steer, not row”. More generally, managerial discretion is often highlighted as a key principle of making performance management work toward organizational objectives. (See Gross, B., and Jochim, A. (eds.). (2013). Leveraging performance management to support school improvement. *The SEA of the Future*, 1(1). San Antonio, TX: Building State Capacity & Productivity Center at Edvance Research, Inc.).

⁴ For a business analogue see Kim, W. C., and Mauborgne, R. (2005). *Blue ocean strategy: How to create uncontested market space and make the competition irrelevant*. Boston: Harvard Business School Press.



or brokering new supports to help the most promising, and phasing out weak, unsuccessful approaches.⁵

CPOs gather performance data for their organizations and analyze this information to determine how organizational performance can improve. A CPO then reports recommendations to other executives.

More and more, the CPO is becoming the official collector of the different perspectives of management and control. Currently many organizations have not only an excessive amount of data and indicators, but also control systems, often with large areas of overlap and sometimes discordant models. A high priority is therefore to select, align and streamline the various metrics with a model of performance management that is closely synchronized with the organizational strategy.

In corporations, using market knowledge and objectives set out in a strategic plan, the CPO creates specific performance goals which might be financial, production-based, or related to the organization's public image. The CPO ensures that the goals are realistic in the business climate, that they are aligned with the mission and vision of the company, and that they will be beneficial to shareholders and employees.

When needed, the CPO communicates with departments and divisions about specific objectives. At the end of a set period, the CPO provides a detailed report and analysis of organizational performance. Information is presented to the executive board (or, equivalent) and problems and potential solutions are discussed. Because the main responsibility of the CPO is to ensure that performance is excellent across the board, these reports focus on the overall strategic goals rather than individual department or division objectives.

What Other Types of Organizations Have Chief Performance Officers?

The role of Chief Performance Officer is common in business and industry. In government, the CPO role has been established at several agencies across different levels.

In the corporate world, CPOs usually work for larger companies, and they report to the executive team. In some cases, CPOs work as part of a performance management team with other executive officers. Instead of focusing on a specific area, such as finances or operations, the CPO assesses the success of an organization as a whole.

Because the CPO has a broad overview of business operations, they are often required to identify and eliminate efficiencies that hinder performance. These include bottlenecks in the production or design cycle, ineffective communication channels, or problems with the organizational

⁵ For a review of how performance management strategies have evolved in public sector organizations, see Heinrich, C. J. (2003). Measuring public sector performance and effectiveness. In Guy Peters and Jon Pierre (eds.), *Handbook of public administrators*. London: Sage Publications, 25–37.



structure. Conversely, the CPO also identifies and spreads effective strategies to other areas of the organization to increase performance and productivity.

Examples from two very different industries highlight the common responsibilities of a corporate CPO.

Wyndham Hotels. The CPO takes the lead in setting the company's strategy and optimizing its performance. In this role, the CPO is responsible for developing and overseeing the Hotel Group's long-term growth plan. The current CPO served the company as vice president of strategy and innovation previously.

Under Armour. The CPO has been a director of Under Armour since September 2003 and its Chief Performance Officer since October 2011 with primary responsibility for the development of company-wide business strategy, human resources, and organizational alignment and processes. Prior to joining Under Armour, he founded and was a managing director of a private investment fund, where he was primarily responsible for assisting management teams in the development of their business strategies and organizations.

A prominent, recent example within government is the **U.S. Office of Management and Budget**, Executive Office of the President of the United States, Jeffrey D. Zients was named CPO. In this role, he is "...committed to working with Federal agencies to maximize the use of performance information to improve the effectiveness, efficiency, responsiveness and transparency of government operations."⁶

City of Chicago. In Chicago David LeBreton is responsible for leading the "Set Targets, Achieve Results" (STAR) program for the Cook County Board's program performance management efforts to increase efficiency and improve the quality of services. This CPO position is the first of its kind at county government. LeBreton previously worked at the Boston Consulting Group and the U.S. Department of Veteran Affairs. He has an MBA from the University of Chicago Booth School of Business.

City of Fort Worth. The mission of the Chief Performance Officer for Fort Worth is to create a city-wide culture of process improvement and performance excellence that keeps the workforce highly engaged. This includes implementation of robust performance management systems and skills; establishment of an employee development structure to produce a highly-skilled and professionally-satisfied workforce; development of a rigorous recruitment and selection process

⁶ Office of Management and Budget. (2011). Roadmap for a more efficient and accountable federal government: implementing the GPRA Modernization Act. In *Statement of the Honorable Jeffrey D. Zients Federal Chief Performance Officer and Deputy Director for Management Office of Management and Budget before the subcommittees on Oversight of Government Management and Federal Financial management Committee on Homeland Security and Governmental Affairs, United States Senate*. Available at <http://www.whitehouse.gov/sites/default/files/omb/performance/Zients-Opening-Statement-to-Senate-Committee-05102011.pdf>



that ensures highly-qualified people are added to the team; and establishment of career ladders that define required skills and paths to promotion. Specifically, the CPO is expected to:

- Create and champion a vision that results in a cultural shift to a continuously learning and improving organization, including implementation of a training effort that empowers others to act on the vision.
- Develop the structure by which leadership development and succession-planning take place.
- Develop a culture that leads, manages and drives accountability and quality every day.

What is the Job Description of a CPO within a State?

The role of Chief Performance Officer is rapidly finding a place in SEAs nationally. The BSCP Center has launched a Community of CPOs that includes members from Illinois, Kentucky, Louisiana and Maryland. Other states are expected to join soon.

One good example of a job description comes from the Kentucky Department of Education. Karen Dodd is the CPO there, and the job description follows:⁷

The Chief Performance Officer gathers performance data for the Kentucky Department of Education and leads researchers in the analysis of this information to determine how educational performance can improve. The Chief Performance Officer then reports recommendations to other executives, the Commissioner of Education and the Kentucky Board of Education. The Chief Performance Officer assists the Commissioner of Education to champion a vision that results in a cultural shift to a continuously learning and improving organization, including implementation of a training effort that empowers others to act on the vision and develop a culture that leads, manages and drives accountability and quality every day.

Develop Strategic Plans

Based on strategic priorities established by the Board of Education and the Commissioner of Education, the CPO facilitates the development of strategic plans for the department. Goals within the plans are based on formulas defined by the United States Department of Education. Goals are specific, measurable, ambitious, realistic and time-bound. They are aligned with the mission and vision of the organization, and they will be beneficial to students, teachers, leaders and stakeholders.

Set Performance Targets

In order to achieve the goals in the strategic plan, the CPO works with researchers and strategy leads to create annual targets, trajectories, delivery chains and strategies.

⁷ Personal correspondence with Karen Dodd, Chief Performance Officer, Kentucky Department of Education.



Direct Research

The Kentucky Department of Education (KDE) has partnered with the Center for Education Policy Research at Harvard University. This partnership is funded through a Bill & Melinda Gates grant that funds two Data Fellows to work full-time with KDE. One internal Agency Fellow also participates in this grant work. The CPO oversees the work of these Fellows to ensure strategies are research-based and data-driven.

Communicate Across the Department

The CPO communicates with offices and divisions about specific strategies. The CPO relies heavily on the input and discussion with strategy teams and communicates the end goal and work with the teams to achieve it.

Report on Performance

At the end of a set period, the CPO provides a detailed report and analysis of strategic performance. Information is reported to Associate Commissioners, the Commissioner, the Board of Education and the Unbridled Learning Guiding Coalition. Reports include problem identification and potential solutions.

Eliminate Inefficiencies

The CPO has a broad overview of department operations and is often required to identify and eliminate inefficiencies that hinder performance. These include bottlenecks in implementation, problems with data collection, ineffective communication channels or problems with the organizational structure.

Spread Effective Strategies

The CPO coordinates with strategy teams and researchers to identify successful schools and districts to determine the factors that contribute to the success. This information is shared with strategy leads and leadership to increase performance and productivity.

What are the Qualifications of a Chief Performance Officer?

The CPO role is demanding because it requires a broad set of capabilities, personal attributes, and experiences to be an effective organizational contributor. CPOs must have experience implementing a culture of process improvement. They must be able to work successfully with the executive team to identify areas of improvement, create projects, and gather resources to work on projects, and manage and track the progress of projects to support the SEAs short- and long-range objectives. A CPO should have experience driving culture change to instill focus on fact-based management practices; exhibit exceptional conceptual, analytical, organizational, and management skills; and, have excellent oral and written communications and human relations skills.



CPOs must have a thorough understanding of education and the role of the SEA in leading policy, supporting programs, and allocating resources. That means that the CPO must understand the Federal regulatory and funding environment, state programs, legislative initiatives, and budgeting. CPOs must also have a strong working knowledge of many SEA functions, including strategic planning, project management, IT, data systems, research and evaluation, budget and finance, and curriculum.

Conclusion

Within SEAs the CPO role addresses the need for the Chief to have one place to turn to get comprehensive information and leadership support. A useful perspective on this comes from the *Harvard Business Review's* HBR Blog Network⁸ "...if you want to align knowledge and learning with work, you need to know something about business processes and how to improve them. And if you're going to align processes with the content needed to perform them effectively, you need to know something about the technology that would deliver the content in accordance with job tasks. What this begins to suggest is that the era of siloed business improvement activities will give way to applying a variety of interventions to improve work. In other words, an organization run by a Chief Performance Officer might be called for. Such a group might have a very broad toolkit—from knowledge to learning to process interventions, and perhaps IT as well. Particularly with knowledge work, these interventions tend to come in linked forms."

As the CPO role becomes more prominent and as experience with it increases, the job will evolve to focus on highest value responsibilities. Just as other organizational roles have emerged, and standards of performance have become established for them, that will occur for the CPO. In short, a CPO can be valuable in a state agency now, and the benefit will be more fully realized over time.

⁸ Davenport, T. (2009). The Rise of the Chief Performance Officer. *Harvard Business Review: HBR Blog Network*. Available at http://blogs.hbr.org/davenport/2009/05/the_rise_of_the_chief_performa.html



The Building State Capacity and Productivity Center (BSCP Center) focuses on helping state education agencies (SEAs) throughout the country, as they adapt to reduced fiscal resources and increased demands for greater productivity. As State Departments of Education are facing a daunting challenge of improving student performance with diminishing financial resources, the BSCP Center provides technical assistance to SEAs that builds their capacity to support local educational agencies (LEAs or districts) and schools, and to the 21 regional and content comprehensive centers that serve them, by providing high quality information, tools, and implementation support. The partners in the BSCP Center are Edvance Research, Inc., the Academic Development Institute, the Center on Reinventing Public Education (University of Washington), and Edunomics Lab (Georgetown University).

Solutions emerges from specific questions or problems facing an SEA that arise during the work of the BSCP Center with the SEA in a consultancy. It represents information that is highly responsive to an SEA's practical needs. The writing of a *Solutions* issue is also stimulated by questions from Comprehensive Centers or SEAs regarding the use of a BSCP Center tool, the application of a new concept, or an implementation challenge.

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