

# Creating a Dashboard for your School

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# Hero # 1





# Details on Montessori

- Born 1870\*
- First female Doctor in Italy
- Professor of Anthropology, University of Rome
- Founded Casa de Bambini 1907
- AMS 1914
- AMI 1929
- Nobel Peace Prize nominee 1949, 1951, 1952

# Hero #2





# Details on Rockefeller

- Born 1839
- Married Laura Celestia Spelman 1864
- Formed Standard Oil in 1870\*
- By 1882 Standard Oil trust owned 20,000 domestic oil wells, 4,000 miles of pipeline, 5000 tank cars, 100,000 employees and refined 90% of the crude oil in world
- Retired in 1899 and spent the last 40 years as a Philanthropist.
- Founded University of Chicago, Rockefeller University, Rockefeller Foundation

# The Rockefeller Habits

- Priorities
- Rhythm
- Data



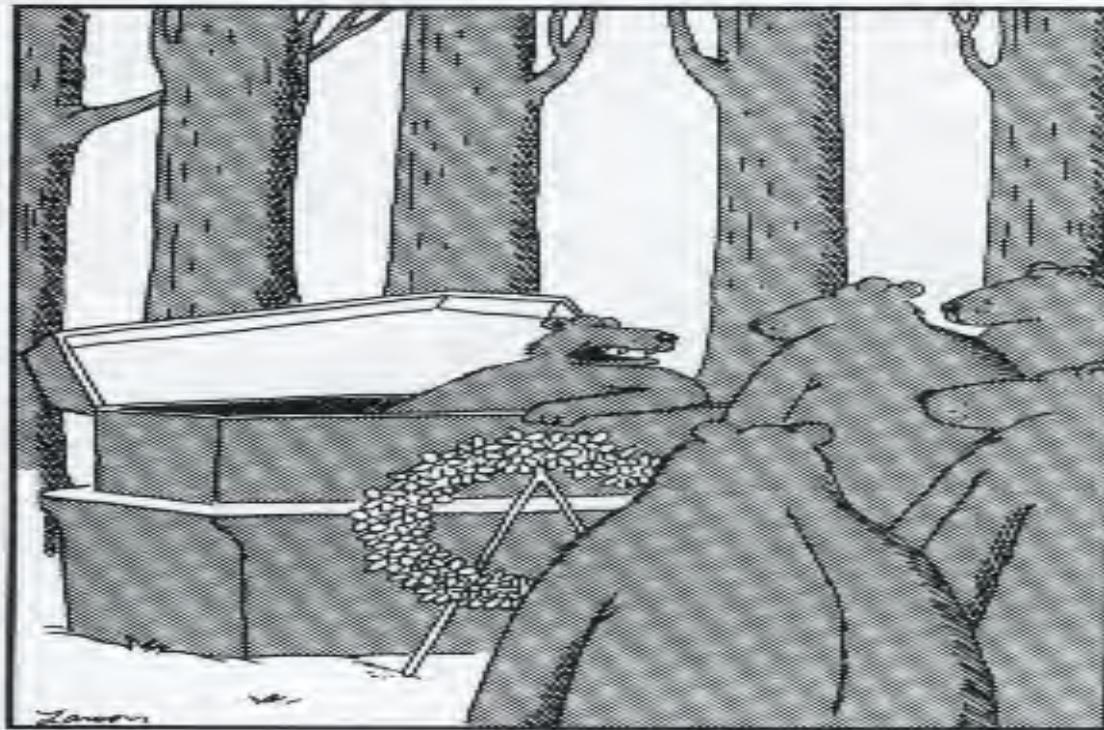
# Concept of the Daily Huddle

- What's up
- Where are you stuck
- Key Numbers



# Importance of Metrics

## Leading versus Lagging Indicators



"For crying out loud, I was *hibernating!* . . . .  
Don't you guys ever take a pulse?"



# Lag Indicators

- Revenue
- Staffing Costs
- Administration Costs
- Net Income
- Enrollment
- Vacancies
- Retention
- Ratio of Funded versus Unfunded Students
- Staff Retention

# Lead Indicators

- Metrics that point to key trends that will influence lag indicators in the future





# Exercise

Consider 4 key areas of your business below what are the key metrics that you should be measuring on a daily basis:

- Sales
- Customer Retention
- Staff Retention
- Cash



# Key Metrics - Sales

- Inquiry
- Information Package goes out
- A tour is booked
- A tour happens
- An observation is booked
- An observation happens
- An application form is submitted
- A family is added to the waitlist
- An offer of place is made
- An offer of place is accepted
- Capital Entry fee is paid
- Student attends school



## Key Metrics – Retention, measuring family engagement

- Number of students attending after school care
- Number of students attending clubs
- Number of parents attending information nights
- Number of parents attending special events
- Student Attendance



## Key Metrics - Measuring Staff Morale

- # of staff away today
- # of staff absences filled
- Active casual relief staff
- # of emergency duties given to staff
- Staff on time
- Meetings with staff



# Key metrics - Cash

- Cash Available (compare to last year)
- AR Collected
- % of Terms fees collected
- YTD Recurrent Grant Money



# Creating the Dashboard

- Make the daily numbers visible, where you do daily huddle, the War Room
- Choose your metrics, what is meaningful to you
- Count them weekly
- Summarize them each term
- Analyze the Data for trends
- Review the metrics are we still counting what matters



# My Dashboard

- Go to excel spreadsheet with data from CMS dashboard



# The Dashboard

## Pros

- What gets measured gets done
- Scientific, objective
- Helps you to hold others accountable
- Helps you to not micro manage
- Helps you predict

## Cons

- What are the targets?
- Can you measure beauty?
- Are you focusing on the right metrics?



# References

- “Titan” by Ron Chernow
- “Good to Great” by Jim Collins
- “The Rockefeller Habits” by Verne Harnish