PROCESS CLASSIFICATION FRAMEWORK℠
FOR EDUCATION

THE FRAMEWORK FOR PROCESS IMPROVEMENT

Experience shows that benchmarking's potential to drive dramatic improvement lies squarely in making out-of-the-box comparisons and searching for insights not typically found within intra-industry paradigms. To enable this beneficial benchmarking, the APQC Process Classification Framework℠ (PCF) serves as a high-level, industry-neutral enterprise model that allows organizations to see their activities from a cross-industry process viewpoint.

Originally created in 1992 by APQC and a group of members, the framework has experienced more than a decade of creative use by hundreds of organizations worldwide. The PCF is supported by the Open Standards Benchmarking Collaborative℠ (OSBC) database and the Collaborative's advisory council of global industry leaders as an open standard. The PCF will continuously be enhanced as the OSBC database further develops definitions, processes, and measures related to process improvement. Please visit APQC's Web site periodically for updates. The PCF is available for organizations of all industries and sizes at no charge by visiting www.apqc.org.

The PCF enables organizations to understand their inner workings from a horizontal process viewpoint, rather than a vertical functional viewpoint. The PCF does not list all processes within a specific organization, and every process listed in the framework is not present in every organization.

HISTORY

The Process Classification Framework was originally envisioned as a taxonomy of business processes. The initial design involved more than 80 organizations with a strong interest in advancing the use of benchmarking in the United States and worldwide.

In 2003 APQC initiated an effort to revise and update the PCF to reflect new business models and emerging dynamics. With guidance from a set of key members, the updated PCF was released in May 2004. This release includes minor updates to 2.2.

APQC would like to acknowledge the following organizations for their participation and help in later versions: the Boeing Co., Boehringer Ingelheim GmbH, BT Group plc, Ensco International Inc., Ford Motor Co., IBM Corp., Schlumberger Ltd., Solvay S.A, and the U.S. Navy. APQC would also like to acknowledge the other APQC members that have contributed and continue to contribute to the ongoing development of the PCF.

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PROCESS CLASSIFICATION FRAMEWORK FOR EDUCATION
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INTERPRETING THE PCF

Category: The highest level within the PCF is indicated by whole numbers (e.g., 8.0 and 9.0).

Process Groups: All PCF items with one decimal numbering (e.g., 8.1 and 9.1) are considered a process area.

Process: All PCF items with two decimal numberings (e.g., 8.1.1 and 9.1.2) are considered processes.

Activity: Items with three decimals (e.g., 8.3.1.1 and 9.1.1.1) are considered activities within a process.

Task: Items with four decimals (e.g., 8.3.1.1.1 and 9.1.1.1.2) are considered tasks within an activity.

Example:

Design and Manage Operations (Category) (4.0)

Plan for and acquire necessary resources—requisition planning (Process Group) (4.1)

Manage enrollments for programs and services (Process) (4.1.1)

Develop baseline forecasts (Activity) (4.1.1.1)

Collaborate with community (Activity) (4.1.1.2)

Develop improvement-planning and goal-setting procedures (Task) (6.3.2.1.1)

OPERATING PROCESSES

| 1.0 Develop a Strategic Plan for the District | 2.0 Develop, Deliver, and Assess Curriculum Instruction | 3.0 Design and Deliver Student Support Services | 4.0 Design and Manage Operations | 5.0 Develop and Manage Stakeholder Relations and Services |

MANAGEMENT AND SUPPORT SERVICES

6.0 Develop and Manage Human Resources Strategies

7.0 Manage Information Technology

8.0 Manage Financial Resources

9.0 Acquire, Construct, and Manage Facilities

10.0 Manage Environmental Health, Safety, and Security

11.0 Manage Intergovernmental and Other Agency Relationships

12.0 Manage Knowledge, Improvement, and Change

1.0 Develop a Strategic Plan for the District

1.1 Adopt a vision and mission for the district

1.1.1   Describe the context in which the district operates

     1.1.1.1   Describe surrounding districts, private schools, home schools, technical schools, GED programs, alternative programs, etc.

     1.1.1.2   Describe history and predictions of tax base, revenue, tax rates, tax legislation, etc.

     1.1.1.3   Describe state laws, state board regulations, local school board policies, federal laws, local municipal regulations, political and public policy action group issues, employee organization issues, etc.

     1.1.1.4   Describe innovations in instructional technology, information management, telecommunications, etc.

     1.1.1.5   Describe history and projections for student enrollments, demographics, and special program needs. Describe community demographics

     1.1.1.6   Describe social and cultural changes that impact public education

     1.1.1.7   Describe ecological issues that impact facilities, transportation, food services, and other enterprises

1.1.2   Conduct a needs assessment for instructional and support services

     1.1.2.1   Develop or adopt assessments, collect data, analyze data, and report findings

     1.1.2.2   Analyze instructional and support services needs, set priorities, and set goals

1.1.3   Set goals and objectives for all instructional and service areas, including targets for subgroups of students

1.1.4   Analyze district strengths and weaknesses

     1.1.4.1   Describe strengths and weaknesses of the district's leadership and management resources

     1.1.4.2   Select metrics and collect data describing the efficiency and effectiveness of current processes

     1.1.4.3   Audit technology and information systems to determine status and steps for improvement

     1.1.4.4   Audit and analyze budgeting, general ledger, fund balance, and other indicators of financial health

     1.1.4.5   Describe what the district does best

1.1.5   Establish management organization and administrative leadership chart. Develop a management vision to accomplish the mission, goals, and objectives of the strategic plan

     1.1.5.1   Communicate vision and develop buy-in from administrators, school staff, instructional faculty, support staff, parent and employee organizations, etc.

1.2 Develop an implementation plan

1.2.1   Develop overall mission statement

1.2.2   Evaluate alternative programs

1.2.3   Develop partnerships with businesses, community, other districts, etc.

1.2.4   Develop a community information program for formal communications around the organization's mission and goals

1.2.5   Identify the function of CIO. Develop a plan for information management that not only collects data but also provides information for data-driven decision making

     1.2.5.1   Define a data dictionary and the periodicity for collecting and reporting data for each department, program, and school

     1.2.5.2   Describe the costs and benefits for collecting, reporting, and making data-driven decisions for each department, program, and school

     1.2.5.3   Identify the district-level staff responsible for knowledge management. Identify the staff within each department, program, and school responsible for knowledge management

1.2.6   Design the district organizational chart

1.2.7   Set goals for the district aligned with the mission statement

1.2.8   Develop within each department, program, and school an annual and long-term improvement plan

1.3 Maintain and monitor the progress of the strategic plan

1.3.1   Develop programs that support the strategic plan

1.3.2   Evaluate the effectiveness of programs

1.3.3   Set priorities for programs based upon evaluations

1.3.4   Adopt high-level goals for the district

2.0 Develop, Deliver, and Assess Curriculum Instruction

2.1 Develop curriculum

2.1.1 Align with federal/state/local standards

    2.1.1.1 Align with content standards developed by national organizations

    2.1.1.2 Align to assessment performance standards

    2.1.1.3 Align to instruction

    2.1.1.4 Identify and review research

2.1.2 Define/Design curriculum development procedures

2.1.3 Provide for parent and community input

2.1.4 Develop scope/sequence/timeline

2.1.5 Develop instructional calendars/pacing guides

2.1.6 Select instructional resources

2.1.7 Demonstrate the program or service to potential participants and document their reactions

2.2 Design and deliver professional learning

2.2.1 Design professional learning programs

    2.2.1.1 Analyze data sources to determine adult learning needs

    2.2.1.2 Research and examine best-practices related to the identified needs

    2.2.1.3 Engage relevant stakeholders

    2.2.1.4 Develop course or plan of action

    2.2.1.5 Align professional development with curriculum, instruction, assessment, policy, school improvement plans, and district and state strategic plans

2.2.2 Identify financial and human resources to support the professional development plan

2.2.3 Engage staff in professional development and learning

    2.2.3.1 Develop content knowledge

    2.2.3.2 Develop engagement strategies

    2.2.3.3 Develop differentiation strategies to target critical needs and special populations

    2.2.3.4 Teach management and leadership techniques

2.2.4 Provide follow-up support for staff

    2.2.4.1 Develop follow-up support framework and approaches

    2.2.4.2 Create opportunities for observation

    2.2.4.3 Provide coaching or mentoring support

    2.2.4.4 Provide leadership coaching

    2.2.4.5 Ensure accessibility to follow-up activities to support implementation of new learning

2.2.5 Evaluate professional learning experience(s)

    2.2.5.1 Determine evaluation methodology

    2.2.5.2 Conduct formative and summative evaluation

    2.2.5.3 Use results from evaluation to modify professional learning

2.2.6 Prioritize development based on resources (align resources)

2.2.7 Provide instructional coaching for teachers and instructional aids

2.2.8 Provide for special needs

    2.2.8.1 Develop teaching strategies to target critical needs as a result of AYP and special populations

    2.2.8.2 Develop teacher leaders

    2.2.8.3 Train aspiring administrators both for vertical and horizontal growth—that is, career ladders up through ranks, as well as deepening skill and knowledge transfer within a single multilevel role such as instructional team leads

    2.2.8.4 Create model classrooms for observation

    2.2.8.5 Teach classroom management techniques

    2.2.8.6 Modify professional learning based on curriculum changes

    2.2.8.7 Evaluate professional learning

2.3 Provide effective instructional programs

2.3.1 Use diagnostics to determine readiness to learn

    2.3.1.1 Use formative assessment to inform ongoing instruction

    2.3.1.2 Determine Kindergarten students' readiness to learn—pre-K intake and readiness

2.3.2 Identify best practices based on data

2.3.3 Establish best-practice instructional strategies

    2.3.3.1 Engage students in the instruction process

2.3.4 Develop an implementation plan

2.3.5 Determine expectation for lesson design

    2.3.5.1 Determine district expectations

    2.3.5.2 Determine campus expectations

    2.3.5.3 Determine level and rigor of instruction expectations

2.3.6 Provide differentiated programs and alternative education based on individual student needs

2.3.7 Identify instructional needs of LEP students

    2.3.7.1 Identify enrichment needs

2.3.7.2 Identify acceleration needs

2.3.7.3 Identify pre-K programs needs

2.3.7.4 Identify gifted education needs

2.3.8 Align after school and summer programs—that is, common content, core training provided

2.3.9 Design instructional programs to accelerate learning for students who are behind grade level

2.3.10 Plan for remedial instruction

2.3.11 Manage the classroom for different learning categories and strategies

2.3.12 Provide academic coaches to support classroom instruction for students

2.4 Assess student achievement

2.4.1 Plan assessment program (Process refers to assessments at the district and multi-school level, rather than teacher-made or single-school assessments)

    2.4.1.1 Assess current assessment program

        2.4.1.1.1 Determine goal of the assessment program in school or

            system improvement

        2.4.1.1.2 Identify mandatory testing by local, district, state, and federal agencies

        2.4.1.1.3 Identify diagnostic, formative, and any voluntary assessment for program

        2.4.1.1.4 Determine target populations of current assessments

        2.4.1.1.5 Analyze current frequency and scheduling of assessments

        2.4.1.1.6 Identify gaps in the assessment program; check for alignment

    2.4.1.2 Design assessment program

        2.4.1.2.1 Determine learning (skills) to be assessed on the assessment

        2.4.1.2.2 Determine performance standards for target populations

        2.4.1.2.3 Select most appropriate format

        2.4.1.2.4 Select vendor-developed assessment or develop the assessment

2.4.2 Develop formative assessment tools

    2.4.2.1 Determine the scope of content and skills to be addressed

    2.4.2.2 Determine for each objective the most appropriate method to assess objective (multiple choice, open-ended, essay, performance, portfolio, etc.)

    2.4.2.3 Determine appropriate delivery format (paper/pencil, online, oral administration, etc.)

    2.4.2.4 Develop blueprint for test development, including number and format of items or tasks for each objective or strand

    2.4.2.5 Develop test item specifications (number of distracters, level of vocabulary, level of thinking or mental processing, performance required)

    2.4.2.6 For performance tasks and open-ended items, develop rubrics that outline requirements for successful response and scoring criteria

    2.4.2.7 Develop items or tasks (locally or contractor)

    2.4.2.8 Review items for content/adherence to blueprint and item specifications by peer review

    2.4.2.9 Develop key or refine rubrics as necessary

    2.4.2.10 Review items for sensitivity and bias

    2.4.2.11 Pilot items or tasks

    2.4.2.12 Review and pilot completed assessment

    2.4.2.13 Revise as needed

2.4.3 Administer formative assessments

    2.4.3.1 Provide necessary training

    2.4.3.2 Distribute the tests or materials needed for assessments

    2.4.3.3 Assess students using appropriate procedures for the assessment

    2.4.3.4 Ensure compliance with assessment procedures

    2.4.3.5 Ensure provision of appropriate accommodations for students

    2.4.3.6 Collect data on participation and possible irregularities and report as appropriate

    2.4.3.7 Receive test materials from schools if stored and/or scored centrally

    2.4.3.8 If scoring is done by a contractor or outside organization, package and transmit materials per instructions

2.4.4 Administer summative assessments

    2.4.4.1 Provide necessary training to school-based staff

    2.4.4.2 Distribute materials

    2.4.4.3 Assess students using appropriate procedures for the assessment

2.4.4.4 Collect data on participation and possible irregularities and report as appropriate

2.4.4.5 Receive and inventory test materials from schools as appropriate

2.4.4.6 If scoring is done by a contractor or outside organization, package and transmit materials per instructions

2.4.5 Score and compile assessment data

2.4.5.1 Plan for scoring of assessment

2.4.5.2 Train key staff in scoring the assessment

2.4.5.3 Score summative/high-stakes assessments

2.4.6 Analyze and evaluate results

2.4.6.1 Identify and explore anomalies

2.4.6.2 Disaggregate the data at the district, school, or classroom level as appropriate (e.g., grade levels, departments, subject areas, and subgroups [socio-economic status, ethnicity])

2.4.6.3 Analyze for gaps and strengths in student achievement

2.4.6.4 Check alignment of instruction with test content

2.4.6.5 Identify trends (e.g., longitudinal, cohort)

2.4.6.6 Identify over/under-achieving schools, programs, grade levels, teachers, etc.

2.4.6.7 Determine gaps between actual student achievement and achievement targets or expectations

2.4.6.8 Feed data/results to appropriate decision makers

2.4.6.9 Provide feedback to state and federal testing agencies or test publishers on quality issues and needed improvements (keep but relocate)

2.4.7 Provide training on analyzing and using data (other training needs are in 6.0 HR)

2.4.7.1 Provide training on data analysis at the district, school, and classroom levels

2.4.7.2 Provide data utilization training to district, school, and classroom levels

2.4.8 Report results (this section assumes the reports are an input to other processes elsewhere in the PCF, such as curriculum development, school district improvements, etc.)

2.4.8.1 Identify audiences

2.4.8.2 Determine information needs of each audience

2.4.8.3 Determine products to meet audiences' needs

2.4.8.4 Determine format and content and specifications for each product to meet audiences' needs

2.4.8.5 Develop timelines aligned with deadlines and audience requirements

2.4.8.6 Produce each reporting product

2.4.8.7 Publish each reporting product

2.4.8.8 Present findings

2.4.8.9 Gather feedback on the usefulness of the reports

2.5 Evaluate programs

2.5.1 Determine programs to be evaluated

2.5.2 Determine (and develop instruments where necessary) the data to be collected, including perception and background surveys, student performance data, observation checklists, comparable schools' data, etc.

2.5.3 Gather the data

2.5.4 Analyze the collected data

2.5.5 Evaluate the program/determine program recommendations

3.0 Design and Deliver Student Support Services—
Includes Extracurricular, Nursing, Counseling
Excludes Food Services and Transportation

3.1 Identify requirement for support services

3.1.1 Interpret rules and regulations

3.1.2 Conduct a district needs assessment for support services

3.1.3 Provide clear process for identifying student needs for support service

3.1.4 Identify gaps in services

3.1.5 Collaborate between services

3.2 Establish entrance and exit criteria for student support services

3.2.1 Establish referral criteria

3.2.2 Establish acceptance criteria

3.2.3 Establish exit criteriag

3.3 Evaluate support programs and services

3.3.1 Train educators to observe

3.3.2 Evaluate services to ensure they provide a positive impact on students

3.3.3 Integrate academic rigor into all service areas provided for students—services such as career development, counseling, teen parenting, health services, etc. to ensure an unrelenting focus is maintained on the acceptance and use of knowledge

3.4 Identify and coordinate community services related to student needs

3.4.1 Identify community partnership opportunities to support mentoring, tutoring, academic enrichment (field trips, etc. to better support student learning; ensure partnerships are valid and maintained

3.4.2 Coordinate direct services of classroom volunteers

3.4.3 Ensure community partners have capacity and expertise to deliver services

3.4.4 Provide a connecting/marketing mechanism between community provider (before, after, and during school) and individual student/family needs

3.4.5 Connect individual needs to best available services

3.4.6 Provide support (staff development) for instructional aides

3.5 Design and implement parent engagement programs

3.5.1 Plan and evaluate role of parents and community in student achievement

3.5.2 Ensure parent and grandparent engagement: 1) readiness for school, 2) student achievement and attendance, 3) graduation requirements

3.5.3 Provide parent education: 1) parenting, 2) English as second language

3.5.4 Develop programs with PTA

3.5.5 Establish parent involvement policy

3.5.6 Develop aligned and frequent parent training on core curriculum and graduation requirements so that the "parent as teacher" concept reaffirms the school's message to the students

3.6 Design and implement counseling services

3.6.1 Develop academic planning to ensure graduation and post graduation opportunities

3.6.2 Develop counseling programs

3.6.3 Align guidance services to support instruction

3.6.4 Identify barriers to student academic achievement

3.7 Design and implement social services

3.7.1 Provide social service support for families/students

3.7.2 Provide homeless services

3.7.3 Provide migrant services

3.7.4 Utilize case management process to streamline and avoid duplication of services to individual student

3.7.5 Manage outsourced services (e.g., child psychologist)

3.8 Design and align extra-curricular services such as interscholastic athletics, clubs, other enrichment opportunities

3.9 Design and implement alternative education/interventions

3.9.1 Create alternative schools: 1) discipline, 2) instructional

3.9.2 Provide early intervention for at-risk students

3.9.3 Monitor attendance

3.9.4 Track replacement behaviors to students with behavior problems

3.9.5 Provide online support programs

3.9.6 Create intervention programs based on benchmarks, summer school, after school

3.9.7 Develop LRE for special ed

3.9.8 Provide teen parenting

3.10 Design and implement student health services such as mental health counseling, community classes, pregnancy services, wellness policy and disease prevention, and nursing

4.0 Design and Manage Operations

4.1 Plan for and acquire necessary resources—requisition planning

4.1.1 Manage enrollments for programs and services
- 4.1.1.1 Develop baseline forecasts
- 4.1.1.2 Collaborate with community
- 4.1.1.3 Develop consensus forecast
- 4.1.1.4 Develop enrollment projections

4.1.2 Create instructional resources plan
- 4.1.2.1 Create overall plan
- 4.1.2.2 Collaborate with suppliers and contractors
- 4.1.2.3 Identify critical materials and supplier capacity
- 4.1.2.4 Generate practical plan based upon reasonable expectations

4.1.3 Schedule the school year (adopt calendar)
- 4.1.3.1 Generate school-level plans
- 4.1.3.2 Collaborate with suppliers

4.1.3.3 Generate and follow detail schedule

4.2 Procure materials and services (e.g., curriculum materials, text books, supplies)

4.2.1 Develop requisition and receiving strategies
- 4.2.1.1 Develop procurement plan
- 4.2.1.2 Clarify purchasing requirements
- 4.2.1.3 Match usage (enrollment based to supply capabilities)
- 4.2.1.4 Analyze district's purchasing history
- 4.2.1.5 Seek opportunities to improve efficiency and value

4.2.2 Select suppliers and develop/maintain contracts
- 4.2.2.1 Identify suppliers (create request for bids list)
- 4.2.2.2 Certify and validate suppliers (receive and accept bids; create a bids list)
- 4.2.2.3 Approve bids
- 4.2.2.4 Manage contracts

4.2.3 Order materials and services
- 4.2.3.1 Process/Review requisitions
- 4.2.3.2 Approve requisitions
- 4.2.3.3 Monitor vendor quotes
- 4.2.3.4 Create/Distribute purchase orders
- 4.2.3.5 Expedite orders and satisfy inquiries
- 4.2.3.6 Record receipt of goods
- 4.2.3.7 Research/Resolve exceptions

4.2.4 Appraise and develop suppliers
- 4.2.4.1 Monitor/Manage supplier information
- 4.2.4.2 Prepare/Analyze spending and vendor performance
- 4.2.4.3 Support inventory processes

4.3 Manage transportation of students

4.3.1 Design routes and schedules
- 4.3.1.1 Build and maintain address files
- 4.3.1.2 Build and maintain student residence files
- 4.3.1.3 Optimize routes and loads
- 4.3.1.4 Evaluate cost effectiveness of services

4.3.2 Plan and deliver special routes and services to support instructional needs
- 4.3.2.1 Schedule events
- 4.3.2.2 Assign resources
- 4.3.2.3 Ensure coordination to curriculum and instructional plans

4.3.3 Manage vehicle acquisition, maintenance, and replacement
- 4.3.3.1 Inventory vehicles, maintenance logs
- 4.3.3.2 Build requirements for vehicles, solicit bids, order

4.4 Manage food services

4.4.1 Certify individual student eligibility for meals

4.4.2 Comply with federal regulations

4.4.3 Procure foods

4.4.4 Deliver meals

4.4.5 Coordinate and collaborate with other departments

4.5 Manage logistics and warehousing

4.5.1 Define logistics strategy
- 4.5.1.1 Translate schools' requirements into logistics requirements
- 4.5.1.2 Design logistics network
- 4.5.1.3 Communicate outsourcing needs
- 4.5.1.4 Develop and maintain delivery service policy
- 4.5.1.5 Optimize distribution to schools' schedules and costs
- 4.5.1.6 Define key performance measures

4.5.2 Plan receivables flow
- 4.5.2.1 Plan receipt of deliveries
- 4.5.2.2 Manage receivables flow
- 4.5.2.3 Monitor receivables delivery performance
- 4.5.2.4 Manage flow of returned products

4.5.3 Operate warehousing
- 4.5.3.1 Track inventory deployment

4.5.3.2 Receive, inspect, and store receivables	4.5.4.3 Manage delivery fleet
4.5.3.3 Track inventory availability	4.5.4.4 Process and audit work orders, requisitions, and documents
4.5.3.4 Pick, pack, and ship materials to schools	4.5.5 Manage returns; manage reverse logistics

4.5.3.2 Receive, inspect, and store receivables

4.5.3.3 Track inventory availability

4.5.3.4 Pick, pack, and ship materials to schools

4.5.3.5 Track inventory accuracy

4.5.3.6 Track third-party logistics storage and shipping performance

4.5.4 Operate delivery to schools

4.5.4.1 Plan, transport, and deliver materials to schools

4.5.4.2 Track delivery performance

4.5.4.3 Manage delivery fleet

4.5.4.4 Process and audit work orders, requisitions, and documents

4.5.5 Manage returns; manage reverse logistics

4.5.5.1 Authorize and process returns

4.5.5.2 Perform reverse logistics

4.5.5.3 Perform salvage activities

4.5.5.4 Manage and process warranty claims

4.6 Provide library services

5.0 Develop and Manage Stakeholder Relations and Services

5.1 Develop stakeholder relationship strategy

5.1.1 Understand stakeholder needs

5.1.2 Identify community and parent segments to target

5.1.3 Define offerings and positioning possibilities

5.1.4 Define channels for relations

5.2 Manage stakeholder relationships strategy

5.2.1 Deliver relationships strategies

5.2.2 Establish relationships goals for each segment and channel

5.2.3 Develop enrollment forecast (new and continuing students)

5.2.4 Establish overall stakeholder relationships budget

5.2.5 Establish stakeholder relationships measures and metrics

5.2.6 Prepare/Analyze/Evaluate relationships results

5.3 Develop communications and publications strategies

5.3.1 Design and develop key groups' strategies

5.3.1.1 Develop key groups' plans

5.3.1.2 Identify priority groups

5.3.1.3 Establish budgets

5.3.1.4 Schedule contacts with groups

5.3.2 Implement agreed-to communications plans

5.3.3 Prepare/Analyze/Evaluate communications results

5.4 Manage communications and public information activities

5.4.1 Design and develop publications

5.4.1.1 Define publications objectives and strategy

5.4.1.2 Define target audiences

5.4.1.3 Engage third-party communications agency

5.4.1.4 Develop publications

5.4.2 Develop media plans

5.4.2.1 Develop media (print, e-mail, Web, broadcast budgets)

5.4.2.2 Develop media plan

5.4.2.3 Implement media plan

5.4.3 Design and develop communication activities

5.4.3.1 Design direct-to-stakeholder communication concepts

5.4.3.2 Plan direct-to-stakeholder communications activities

5.4.3.3 Test and implement direct activities

5.4.3.4 Prepare/Analyze/Evaluate direct communications performance measures and metrics

5.4.3.5 Refine direct communications performance metrics

5.4.4 Design and develop communication partners and alliances (e.g., associations, businesses, consultants, nonprofits)

5.5 Manage stakeholder relationships and transactions

5.5.1 Manage stakeholder support channels

5.5.2 Respond to stakeholder inquiries

5.5.2.1 Respond to information requests

5.5.2.2 Respond to records inquiries

5.5.2.3 Respond to services inquiries

5.5.3 Manage stakeholder complaints

5.5.4 Capture and assess stakeholder feedback

5.5.4.1 Obtain after-case feedback

5.5.4.2 Conduct qualitative/quantitative surveys

5.5.5 Measure stakeholders' satisfaction

5.5.6.1 Monitor satisfaction with schools, programs, and services

5.5.6.2 Monitor satisfaction with complaint resolution

5.5.6.3 Monitor satisfaction with communications

5.5.6.4 Determine stakeholder loyalty/lifetime value

5.6 Manage budget

5.6.1 Develop volume/unity forecast and set budget

5.6.2 Implement budget plan

5.6.3 Evaluate budget impact

5.6.4 Refine budget as needed

6.0 Develop and Manage Human Resources (HR) Strategies

6.1 Create and manage human resources (HR) planning, policy and strategies)

6.1.1 Manage/Align/Deliver HR strategy

    6.1.1.1 Identify organizational strategic HR needs

    6.1.1.2 Identify organizational tactical HR needs

    6.1.1.3 Define HR and district function roles and accountability

    6.1.1.4 Determine HR costs

6.1.2 Develop and implement HR plans

    6.1.2.1 Develop work force plan

    6.1.2.2 Develop compensation plan

    6.1.2.3 Develop succession plan

    6.1.2.4 Develop employee diversity plan

    6.1.2.5 Develop other HR programs

    6.1.2.6 Develop HR policies

    6.1.2.7 Administer HR policies

    6.1.2.8 Plan employee benefits

6.1.3 Monitor and update plans

    6.1.3.1 Measure realization of objectives

    6.1.3.2 Measure contribution to district goals and objective

    6.1.3.3 Communicate plans and provide updates to board of education

    6.1.3.4 Determine value added from HR function

    6.1.3.5 Review and revise HR plans

6.2 Recruit, source, and select employees

6.2.1 Create and develop employee requisitions/vacancy posting

6.2.2 Recruit candidates

6.2.3 Screen and select candidates

6.2.4 Manage new hire/rehire

6.2.5 Track candidates

6.3 Develop and counsel employees

6.3.1 Manage employee orientation and assignment

    6.3.1.1 Create/Maintain employee orientation program

    6.3.1.2 Introduce new employees to managers

    6.3.1.3 Introduce workplace

6.3.2 Manage employee performance

    6.3.2.1 Define performance objectives

        6.3.2.1.1 Develop improvement-planning and goal-setting procedures

        6.3.2.1.2 Derive individual and school/grade objectives from organizational goals

        6.3.2.1.3 Determine individual staff development objectives from individual improvement plan and goals

        6.3.2.1.4 Communicate compensation system elements and philosophy

    6.3.2.2 Review, appraise, and manage employee performance

        6.3.2.2.1 Perform coaching and mentoring

        6.3.2.2.2 Review employee objectives

        6.3.2.2.3 Measure performance against employee objectives; observe performance

        6.3.2.2.4 Perform appraisal

    6.3.2.3 Evaluate and review performance program

        6.3.2.3.1 Evaluate performance

        6.3.2.3.2 Review objectives

        6.3.2.3.3 Determine input for training plans

6.3.3 Manage employee relations

    6.3.3.1 Manage health and safety

    6.3.3.2 Manage labor relations

    6.3.3.3 Manage collective bargaining process

6.3.3.4   Manage labor management partnerships

6.3.4   Manage employee development

    6.3.4.1   Develop competency management plans

        6.3.4.1.1   Define organizational and individual performance competency requirements

        6.3.4.1.2   Identify skills and competency gaps

        6.3.4.1.3   Develop plans to address skills gaps

        6.3.4.1.4   Define and align work outputs and metrics

    6.3.4.2   Develop employee career plans

        6.3.4.2.1   Develop career plan structure

        6.3.4.2.2   Develop performance management structures and procedures

        6.3.4.2.3   Derive individual and school/grade objectives from district goals

        6.3.4.2.4   Determine individual development objectives from job description/competence profile

        6.3.4.2.5   Communicate compensation system elements and philosophy

    6.3.4.3   Manage employee skills development

6.3.5   Develop and train employees

    6.3.5.1   Align employee, school, and district development needs

    6.3.5.2   Develop functional/process competencies

    6.3.5.3   Establish training needs by analysis of required and available skills

    6.3.5.4   Develop, conduct, and manage employee and/or management training programs

        6.3.5.4.1   Reinforce training and development after completion

        6.3.5.4.2   Evaluate training effectiveness

6.3.6   Manage employee talent

    6.3.6.1   Match resources to requirements

6.4   Reward and retain employees

6.4.1   Develop and manage reward, recognition, and motivation programs

    6.4.1.1   Develop salary/compensation structure and plan

    6.4.1.2   Develop benefits and reward plan

    6.4.1.3   Perform competitive analysis of benefit and rewards

    6.4.1.4   Identify compensation requirements based on financial benefits and HR policies

    6.4.1.5   Administer compensation and rewards to employees

    6.4.1.6   Award and motivate employees

6.4.2   Manage and administer benefits

    6.4.2.1   Deliver employee benefits program

        6.4.2.1.1   Deliver retirement plans

        6.4.2.1.2   Deliver insurance plans

        6.4.2.1.3   Deliver medical plans

        6.4.2.1.4   Deliver savings plans

    6.4.2.2   Administer benefit enrollment

    6.4.2.3   Process claims

    6.4.2.4   Perform benefit reconciliation

6.4.3   Manage employee assistance and retention

    6.4.3.1   Deliver programs to support work/life balance for employees

    6.4.3.2   Develop family support systems

    6.4.3.3   Review retention and motivation indicators

    6.4.3.4   Review compensation plan

6.4.4   Payroll administration

6.5   Redeploy and retire employees

6.5.1   Manage promotion and demotion process

6.5.2   Manage employment termination

6.5.3   Manage retirement

6.5.4   Manage leave of absence, sabbatical

6.5.5   Develop and implement employee placements outside district

6.5.6   Manage deployment of personnel

6.5.7   Relocate employees and manage assignments

6.5.8   Manage employment reduction in force and retirement

6.5.9   Manage former employees

6.5.10   Manage employee relocation process

6.6   Manage employee information

6.6.1   Manage reporting processes

6.6.2   Manage employee inquiry process

6.6.3   Manage and maintain employee data

6.6.4   Manage content

6.6.5   Manage HR information systems (HRIS)

6.6.6   Develop and manage employee performance indicators

6.6.7   Develop and manage time and attendance

6.6.8   Manage employee communication

6.6.8.1   Develop employee communication plan

6.6.8.2   Manage/Collect employee suggestions

6.6.8.3   Manage employee grievances

6.6.8.4   Publish employee communications

7.0   Manage Information Technology

7.1   Manage the business of information technology (IT)

7.1.1   Develop the IT strategy

    7.1.1.1   Build strategic intelligence

    7.1.1.2   Develop and maintain a business-focused IT strategy

7.1.2   Define the enterprise architecture

    7.1.2.1   Establish the enterprise architecture definition

    7.1.2.2   Confirm enterprise architecture maintenance

    7.1.2.3   Act as clearinghouse for IT research and innovation

    7.1.2.4   Govern the enterprise architecture

7.1.3   Manage the IT portfolio

    7.1.3.1   Maximize the value of the IT portfolio

    7.1.3.2   Provision resources in accordance with strategic priorities

    7.1.3.3   Achieve a balanced IT portfolio

7.1.4   Perform IT research and innovation

    7.1.4.1   Explore technologies to innovate IT services and solutions

    7.1.4.2   Transition viable technologies for IT services and solutions development

7.1.5   Perform IT financial management

    7.1.5.1   Develop and maintain IT services and solutions cost transparency

    7.1.5.2   Establish and maintain project-based accounting

    7.1.5.3   Tie project funding to business case decision checkpoints

7.1.6   Evaluate and communicate IT business value and performance

    7.1.6.1   Establish and monitor key performance indicators

    7.1.6.2   Evaluate IT plan performance

    7.1.6.3   Demonstrate IT value

7.1.7   Perform IT HR management

    7.1.7.1   Develop IT leadership and staff

    7.1.7.2   Manage IT HR performance

7.1.8   Manage IT suppliers and contractors

    7.1.8.1   Evaluate supplier performance

    7.1.8.2   Assess contract performance

    7.1.8.3   Negotiate with suppliers

7.2   Develop and manage IT customer relationships

7.2.1   Develop IT services and solutions strategy

    7.2.1.1   Research IT services and solutions wants and needs of the business and users

    7.2.1.2   Translate wants and needs into IT services and solutions requirements

    7.2.1.3   Formulate IT services and solutions strategic initiatives

    7.2.1.4   Evaluate and select IT services and solutions strategic initiatives

7.2.2   Develop and manage IT service levels

    7.2.2.1   Create and maintain the IT services and solutions catalog

    7.2.2.2   Establish and maintain business and IT service level agreements

    7.2.2.3   Evaluate and report service level attainment results

    7.2.2.4   Communicate business and IT service level improvement opportunities

7.2.3   Perform demand side management (DSM) for IT services

    7.2.3.1   Understand IT services and solutions consumption and usage

    7.2.3.2   Develop and implement incentive programs that improve consumption efficiency

    7.2.3.3   Develop volume/unit forecast for IT service and solutions

7.2.4   Manage IT customer satisfaction

    7.2.4.1   Capture and analyze customer satisfaction

    7.2.4.2   Assess and communicate customer satisfaction patterns

7.2.5   Market IT services and solutions

    7.2.5.1   Develop IT services and solutions marketing strategy

    7.2.5.2   Develop and manage IT customer strategy

7.2.5.3 Manage IT services and solutions advertising and promotional campaigns

7.2.5.4 Process and track IT services and solutions orders

7.3 Manage business resiliency and risk

7.3.1 Develop and manage business resilience

7.3.1.1 Develop the business resilience strategy

7.3.1.2 Perform continuous business operations planning

7.3.1.3 Maintain continuous business operations

7.3.2 Develop and manage regulatory compliance

7.3.2.1 Develop the regulatory compliance strategy

7.3.2.2 Establish regulatory compliance controls

7.3.2.3 Manage regulatory compliance remediation

7.3.3 Perform integrated risk management

7.3.3.1 Develop an integrated risk strategy

7.3.3.2 Manage integrated risks

7.3.4 Develop and implement security, privacy, and data protection controls

7.3.4.1 Establish information security, privacy, and data protection strategies and levels

7.3.4.2 Test, evaluate, and implement information security, and privacy and data protection controls

7.4 Manage enterprise information

7.4.1 Develop the information management and content management strategies

7.4.1.1 Understand information needs and the role of IT services for executing the business strategy

7.4.1.2 Assess the information and IT knowledge management implications of new technologies

7.4.1.3 Plan information and IT knowledge management actions and priorities

7.4.2 Define the enterprise information architecture

7.4.2.1 Define information elements, composite structure, logical relationships and constraints, and derivation rules

7.4.2.2 Define information access requirements

7.4.2.3 Establish data custodianship

7.4.3 Manage information resources

7.4.3.1 Define the enterprise information/data policies and standards

7.4.3.2 Determine IT knowledge requirements and assign knowledge area responsibility

7.4.3.3 Develop and implement data and knowledge area administration

7.4.4 Perform enterprise data and content management

7.5 Develop and maintain information technology solutions

7.5.1 Develop the IT development strategy

7.5.1.1 Establish sourcing strategy for IT development

7.5.1.2 Define development processes, methodologies, and tools standards

7.5.1.3 Select development methodologies and tools

7.5.2 Perform IT services and solutions life cycle planning

7.5.2.1 Plan development to satisfy new requirements

7.5.2.2 Plan development for feature and functionality enhancement

7.5.2.3 Develop end of life plan for IT services and solutions

7.5.3 Develop and maintain IT services and solutions architecture

7.5.4 Create IT services and solutions

7.5.4.1 Understand confirmed requirements

7.5.4.2 Design IT services and solutions

7.5.4.3 Acquire/Develop IT service/solution components

7.5.4.4 Test IT service/solution

7.5.4.5 Confirm customer acceptance

7.5.4.6 Test and deploy IT service/solution change

7.6 Deploy information technology solutions

7.6.1 Develop the IT deployment strategy

7.6.1.1 Establish IT services and solutions change policies

7.6.1.2 Define deployment process, procedures, and tools standards

7.6.1.3 Select deployment methodologies and tools

7.6.2 Plan and implement changes

7.6.2.1 Plan change deployment

7.6.2.2 Administer change schedule

7.6.2.3 Distribute and install change

7.6.2.4 Verify change

7.6.3 Plan and manage releases

7.6.3.1 Understand and coordinate release design and acceptance

7.6.3.2 Plan release rollout

7.6.3.3 Distribute and install release

7.6.3.4 Verify release

7.7   Deliver and support information technology services

7.7.1   Develop the IT services and solution delivery strategy

    7.7.1.1   Establish sourcing strategy for IT delivery

    7.7.1.2   Define delivery processes, procedures, and tools standards

    7.7.1.3   Select delivery methodologies and tools

7.7.2   Develop the IT support strategy

    7.7.2.1   Establish sourcing strategy for IT support

    7.7.2.2   Define IT support services for help and assistance with the use of IT

7.7.3   Plan and manage IT infrastructure resources

    7.7.3.1   Manage IT inventory and assets

    7.7.3.2   Manage IT resource capacity

7.7.4   Manage IT infrastructure operations

    7.7.4.1   Deliver IT services and solutions

    7.7.4.2   Perform IT operations support services

7.7.5   Support IT services and solutions

    7.7.5.1   Manage availability

    7.7.5.2   Manage facilities

    7.7.5.3   Manage backup/recovery

    7.7.5.4   Manage performance and capacity

    7.7.5.5   Manage incidents

    7.7.5.6   Manage problems

    7.7.5.7   Manage inquires

7.8   Manage IT knowledge

7.8.1   Manage IT-specific knowledge capture and availability

7.8.2   Enable collaborative work

8.0   Manage Financial Resources

8.1   Perform planning and management accounting

8.1.1   Perform planning/budgeting/forecasting

    8.1.1.1   Develop and maintain budget policies and procedures

    8.1.1.2   Prepare periodic budgets and plans

    8.1.1.3   Prepare periodic forecasts

8.1.2   Perform cost accounting and control

    8.1.2.1   Perform inventory accounting

8.1.3   Perform cost management

    8.1.3.1   Determine key cost drivers

    8.1.3.2   Measure cost drivers

    8.1.3.3   Determine critical activities

    8.1.3.4   Manage asset resource deployment and utilization

8.1.4   Evaluate and manage financial performance

    8.1.4.1   Evaluate program and services effectiveness

    8.1.4.2   Evaluate new programs and services

    8.1.4.3   Perform life cycle costing

    8.1.4.4   Optimize match of programs and services to student needs

    8.1.4.5   Track performance of new program and services strategies

    8.1.4.6   Prepare activity-based performance measures

    8.1.4.7   Manage continuous cost improvement

8.2   Perform "revenue" accounting

8.2.1   Process taxpayer accounts

    8.2.1.1   Establish collection policies

    8.2.1.2   Assess and bill new properties

    8.2.1.3   Review existing properties

    8.2.1.4   Produce assessment/collection reports

8.2.2   Generate tax statements

    8.2.2.1   Maintain property/taxpayer master files

    8.2.2.2   Generate taxpayer billing data

    8.2.2.3   Transmit billing data to taxpayers

    8.2.2.4   Post receivable entries

    8.2.2.5   Resolve customer assessment inquiries

8.2.3   Process accounts receivable (AR)

    8.2.3.1   Establish AR policies

    8.2.3.2   Receive/Deposit payments

    8.2.3.3   Apply cash remittances

    8.2.3.4   Prepare AR reports

    8.2.3.5   Post AR activity to the general ledger

8.2.4   Manage and process collections

    8.2.4.1   Establish policies for delinquent accounts

    8.2.4.2   Analyze delinquent account balances

    8.2.4.3   Correspond/Negotiate with delinquent accounts

    8.2.4.4   Discuss account resolution with internal parties

    8.2.4.5   Process adjustments/write-off balances

8.2.5   Manage and process adjustments/deductions

    8.2.5.1   Establish policies/procedures for adjustments

8.2.5.2　Analyze adjustments

8.2.5.3　Correspond/Negotiate with taxpayer

8.2.5.4　Discuss resolution with internal parties

8.2.5.5　Prepare assessment adjustments

8.2.5.6　Process related entries

8.3　Perform general accounting and reporting

8.3.1　Manage policies and procedures

8.3.1.1　Negotiate service level agreements

8.3.1.2　Establish accounting policies

8.3.1.3　Set up and enforce approval limits

8.3.1.4　Establish common financial systems

8.3.2　Perform general accounting

8.3.2.1　Maintain chart of accounts

8.3.2.2　Process journal entries

8.3.2.3　Process allocations

8.3.2.4　Process period-end adjustments (e.g., accruals and currency conversions, etc.)

8.3.2.5　Post and reconcile interagency transactions

8.3.2.6　Reconcile general ledger accounts

8.3.2.7　Perform consolidations and process eliminations

8.3.2.8　Prepare trial balance

8.3.2.9　Prepare and post management adjustments

8.3.3　Perform fixed asset accounting (facilities)

8.3.3.1　Establish fixed asset policies and procedures

8.3.3.2　Maintain fixed asset master data files

8.3.3.3　Process and record fixed asset additions and retires

8.3.3.4　Process and record fixed asset adjustments, enhancements, revaluations, and transfers

8.3.3.5　Process and record fixed asset maintenance and repair expenses

8.3.3.6　Calculate and record depreciation expense

8.3.3.7　Reconcile fixed asset ledger

8.3.3.8　Track fixed assets including physical inventory

8.3.3.9　Provide fixed asset data to support tax, statutory, and regulatory reporting

8.3.4　Perform financial reporting

8.3.4.1　Prepare departmental financial statements

8.3.4.2　Prepare consolidated financial statements

8.3.4.3　Perform departmental reporting/review management reports

8.3.4.4　Perform consolidated reporting/review of cost management reports

8.3.4.5　Prepare statements for board

8.3.4.6　Produce quarterly/annual filings and public reports

8.3.4.7　Produce regulatory reports

8.4　Manage fixed assets (facilities) budgets

8.4.1　Perform capital planning and project approval

8.4.1.1　Develop capital investment policies and procedures

8.4.1.2　Develop and approve capital expenditure plans and budgets

8.4.1.3　Review and approve capital projects and fixed asset acquisitions

8.4.1.4　Perform justification for bond/project approval

8.4.2　Perform capital project accounting

8.4.2.1　Set up projects

8.4.2.2　Record project-related transactions

8.4.2.3　Monitor and track capital projects and budget spending

8.4.2.4　Close/Capitalize projects

8.5　Process payroll

8.5.1　Report time

8.5.1.1　Establish policies and procedures

8.5.1.2　Collect and record employee time information

8.5.1.3　Analyze and report paid and unpaid leave

8.5.1.4　Monitor regular overtime and other hours

8.5.1.5　Analyze and report employee utilization

8.5.2　Manage pay

8.5.2.1　Enter employee time into payroll system

8.5.2.2　Maintain and administer employee earnings information

8.5.2.3　Maintain and administer applicable deductions

8.5.2.4　Monitor changes in tax status of employees

8.5.2.5　Process and distribute payments

8.5.2.6　Process and distribute manual checks

8.5.2.7　Process end-of-period adjustments

8.5.2.8　Respond to employee payroll inquiries

8.5.3　Process taxes

8.5.3.1　Calculate and pay applicable payroll taxes

8.5.3.2　Produce and distribute employee annual tax statements

8.5.3.3　File regulatory payroll tax forms

8.6 Process accounts payable and expense reimbursements

- 8.6.1 Process accounts payable (AP)
  - 8.6.1.1 Verify AP pay file with PO vendor master file
  - 8.6.1.2 Maintain/Manage electronic commerce
  - 8.6.1.3 Audit invoices and key data into AP system
  - 8.6.1.4 Approve payments
  - 8.6.1.5 Process financial accruals and reversals
  - 8.6.1.6 Process taxes
  - 8.6.1.7 Research/Resolve exceptions
  - 8.6.1.8 Process payments
  - 8.6.1.9 Respond to AP inquiries
  - 8.6.1.10 Retain records
  - 8.6.1.11 Adjust accounting records
- 8.6.2 Process expense reimbursements
  - 8.6.2.1 Establish and communicate expense reimbursement policies and approval limits
  - 8.6.2.2 Capture and report relevant tax data
  - 8.6.2.3 Approve reimbursements and advances
  - 8.6.2.4 Process reimbursements and advances
  - 8.6.2.5 Manage personal accounts

8.7 Manage treasury operations

- 8.7.1 Develop treasury plan, policies, and procedures
- 8.7.2 Manage cash
  - 8.7.2.1 Plan short-term cash
  - 8.7.2.2 Manage cash balances
  - 8.7.2.3 Manage cash equivalents
  - 8.7.2.4 Manage cash receipts
  - 8.7.2.5 Prepare cash forecast
  - 8.7.2.6 Monitor credit
  - 8.7.2.7 Monitor cash outflows
  - 8.7.2.8 Report cash status
- 8.7.3 Reconcile bank accounts
- 8.7.4 Manage financial risks (exchange risk, liquidity, etc.)

8.8 Manage internal controls

- 8.8.1 Establish adequate internal control processes, including segregation of duties
- 8.8.2 Meet with internal and external auditors to discuss their assessments of internal controls
- 8.8.3 Assess the adequacy of internal controls ove information systems and e-commerce
- 8.8.4 Create a process where employees can report suspected fraud in confidence
- 8.8.5 Create a formal process of investigating complaints
- 8.8.6 Recommend corrective action
- 8.8.7 Report audit results

9.0   Acquire, Construct, and Manage Facilities

9.1 Property design and construction

- 9.1.1 Develop school building strategy
- 9.1.2 Develop and construct schools
- 9.1.3 Plan schools
  - 9.1.3.1 Design school
  - 9.1.3.2 Analyze budget
  - 9.1.3.3 Select property
  - 9.1.3.4 Negotiate terms
  - 9.1.3.5 Manage construction/building
  - 9.1.3.6 Dispose of old school
- 9.1.4 Provide classrooms and central facilities
  - 9.1.4.1 Acquire classrooms and furnishings
  - 9.1.4.2 Change fit/form/function of classrooms and furnishings

9.2 Maintain classrooms and furnishings

- 9.2.1 Move people and furnishings
  - 9.2.1.1 Relocate people
  - 9.2.1.2 Relocate furnishings and materials
- 9.2.2 Repair workplace and furnishings
- 9.2.3 Provide preventative maintenance for classrooms and furnishings
- 9.2.4 Manage security of facilities and employees

9.3 Dispose of classrooms and furnishings

- 9.3.1 Dispose of equipment
- 9.3.2 Dispose of classrooms and central facilities

9.4 Manage physical risk

9.5 Manage capital asset

10.0 Manage Environmental Health, Safety, and Security

10.1 Determine environmental health, safety, and security impacts

10.1.1 Evaluate impact of programs, services, and operations

10.1.2 Conduct health, safety, security, and environmental audits

10.2 Develop and execute health, safety, security, and environmental program

10.2.1 Identify regulatory and stakeholder requirements

10.2.2 Assess future risks and opportunities

10.2.3 Create policy

10.2.4 Record and manage environmental health and safety events

10.3 Train and educate employees

10.3.1 Communicate issues to stakeholders and provide support

10.4 Monitor and manage health, safety, security, and environmental program

10.4.1 Manage environmental health, safety, and security costs and benefits

10.4.2 Measure and report environmental health, safety, and security performance

    10.4.2.1 Implement emergency response program

    10.4.2.2 Implement pollution prevention program

10.4.3 Provide employees with environmental health, safety and security support

10.5 Ensure compliance with regulations

10.5.1 Monitor compliance

10.5.2 Perform compliance audit

10.5.3 Comply with regulatory stakeholders' requirements

10.6 Manage remediation efforts

10.6.1 Create remediation plans

10.6.2 Contact and confer with experts

10.6.3 Identify/Dedicate resources

10.6.4 Investigate legal aspects

10.6.5 Investigate damage cause

10.6.6 Amend or create policy

11.0 Manage Intergovernmental and Other Agency Relationships

11.1 Build funding relationships

11.1.1 Plan, build, and manage relations with state legislature and federal agencies, community, and funding groups

11.1.2 Plan, build, and manage financial analyst/ratings relations

11.1.3 Communicate with taxpayers

11.2 Manage government and other district relationships

11.2.1 Manage education industry relations with government

11.2.2 Manage education relations with quasi-government bodies

11.2.3 Manage relations with associations, stakeholder, and education groups

11.2.4 Manage lobby activities

11.3 Manage relations with board of education

11.3.1 Report results

11.3.2 Address audit

11.4 Manage legal and ethical issues

11.4.1 Create ethics policies

11.4.2 Manage district governance policies

11.4.3 Develop and perform preventative law programs

11.4.4 Ensure compliance

11.4.5 Manage outside counsel

    11.4.5.1 Assess problem and determine work requirements

    11.4.5.2 Engage/Retain outside counsel if necessary

    11.4.5.3 Receive strategy/budget

    11.4.5.4 Receive work product and manage/monitor case and work performed

    11.4.5.5 Process pay for legal services

    11.4.5.6 Track legal activity/performance

11.4.6 Protect intellectual property

    11.4.6.1 Manage copyrights and patents

    11.4.6.2 Maintain intellectual property rights and restrictions

11.4.6.3 Administer licensing terms

11.4.6.4 Administer options

11.4.7 Resolve disputes and litigations

11.4.8 Provide legal advice/counseling

11.4.9 Negotiate and document agreements/contracts

11.5 Manage public relations program

11.5.1 Manage relations with parent, student, and community groups

11.5.2 Manage relations with association and educatio groups

11.5.3 Manage relations with vendors and suppliers

11.5.4 Manage community relations

11.5.5 Manage media relations

11.5.6 Promote political stability

11.5.7 Create press releases

12.0 Manage Knowledge, Improvement, and Change

12.1 Create and manage organizational performance strategy

12.1.1 Create district measurement systems model

12.1.2 Measure process productivity

12.1.3 Measure cost effectiveness

12.1.4 Measure staff efficiency

12.2.5 Measure cycle time

12.2.6 Measure outcomes

12.2 Benchmark performance

12.2.1 Conduct performance assessments

12.2.2 Develop benchmarking capabilities

12.2.3 Conduct process benchmarking

12.2.4 Conduct competitive benchmarking

12.2.5 Conduct gap analysis to understand the need for and the degree of change needed

12.2.6 Establish need for change

12.3 Develop enterprise-wide knowledge management (KM) capability

12.3.1 Develop KM strategy

12.3.1.1 Develop governance model

12.3.1.2 Establish a central KM core group

12.3.1.3 Define roles and accountability of the core group versus operating units

12.3.1.4 Develop funding models

12.3.1.5 Identify links to key initiatives

12.3.1.6 Develop core KM methodologies

12.3.1.7 Assess IT needs and engage IT function

12.3.1.8 Develop training and communication plans

12.3.1.9 Develop change management approaches

12.3.1.10 Develop strategic measures and indicators

12.3.1.11 Assess maturity of existing KM initiatives

12.3.2 Identify and plan KM projects

12.3.2.1 Identify strategic opportunities to apply KM approach(es)

12.3.2.2 Identify KM requirements and objectives

12.3.2.3 Assess culture and readiness for KM approach

12.3.2.4 Identify appropriate KM methodologies (e.g., self-service, communities, transfer, etc.)

12.3.2.5 Create business case and obtain funding

12.3.2.6 Develop project measures and indicators

12.3.3 Design and launch KM projects

12.3.3.1 Design process for knowledge sharing, capture, and use

12.3.3.2 Define roles and resources

12.3.3.3 Identify specific IT requirements

12.3.3.4 Create training and communication plans

12.3.3.5 Develop change management plans

12.3.3.6 Design recognition and reward approaches

12.3.3.7 Design and plan launch of KM project

12.3.3.8 Deploy the KM project

12.3.4 Manage the KM project life cycle

12.3.4.1 Assess alignment with business goals

12.3.4.2 Evaluate impact of KM (strategy and projects) on measures and outcomes

12.3.4.3 Promote and sustain activity and involvement

12.3.4.4 Realign and refresh KM strategy and approaches

12.4   Manage change

12.4.1   Plan for change

    12.4.1.1   Select a robust process improvement methodology

    12.4.1.2   Assess readiness for change

    12.4.1.3   Determine stakeholders

    12.4.1.4   Engage/Identify champion

    12.4.1.5   Form design team

    12.4.1.6   Define scope

    12.4.1.7   Understand current state

    12.4.1.8   Define future state

    12.4.1.9   Conduct risk analysis

    12.4.1.10   Assess cultural issues

    12.4.1.11   Establish accountability for change management

    12.4.1.12   Identify barriers to change

    12.4.1.13   Determine change enablers

    12.4.1.14   Identify resources and develop measures

12.4.2   Design the change

    12.4.2.1   Assess connection to other initiatives

    12.4.2.2   Develop change management plans

    12.4.2.3   Develop training plan

    12.4.2.4   Develop communication plan

    12.4.2.5   Develop rewards/incentives plan

    12.4.2.6   Establish metrics

    12.4.2.7   Establish/Clarify new roles

    12.4.2.8   Identify budget/roles

12.4.3   Implement change

    12.4.3.1   Create commitment for improvement/change

    12.4.3.2   Reengineer instructional and operational processes and systems

    12.4.3.3   Support transition to new roles or exit strategies for incumbents

    12.4.3.4   Monitor change

12.4.4   Sustain improvement

    12.4.4.1   Monitor improved process performance

    12.4.4.2   Capture and reuse lessons learned from change process

    12.4.4.3   Take corrective action as necessary

THE APQC PROCESS CLASSIFICATION FRAMEWORK FOR EDUCATION
LOOKING FORWARD

The APQC Process Classification Framework is an evolving model, which APQC will continue to enhance and improve regularly. Thus, APQC encourages comments, suggestions, and more importantly, the sharing of insights from having applied the APQC PCF within your organization. Share your suggestions and experiences with the PCF by e-mailing pcf_feedback@apqc.org.

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APQC PROCESS CLASSIFICATION FRAMEWORK^{SM} FOR EDUCATION

The PCF was developed by APQC and member companies as an open standard to facilitate improvement through process management and benchmarking regardless of industry, size, or geography. The PCF organizes operating and management processes into 12 enterprise-level categories, including process groups and more than 1,500 processes and associated activities. The PCF and associated measures and benchmarking surveys are available for download and completion at no charge at www.apqc.org/OSBCdatabase.

123 North Post Oak Lane, Third Floor
Houston, Texas 77024-7797, USA
(800) 776-9676 phone • (713) 681-4020 • (713) 685-4611 fax
www.apqceducation.org