

APPENDIX A: OUTCOMES AND MILESTONES CHART

	Current Status/Baseline	Anticipated Progress or Completion				
		Period 1: Jul-Sept 2013	Period 2: Oct-Dec 2013	Period 3: Jan-Mar 2014	Period 4: Apr-Jun 2014	Period 5: Jul-Oct 2014
OUTCOME 1						
Knox County Schools adopts a 2014-15 budget that reflects significant steps to align resources needed to implement the instructional strategies desired by the KCS leadership.	The 2014-15 budget development cycle has not yet begun. Steps to identify resource alignment opportunities to maximize funding for highest impact areas have not yet been taken.	Key inputs developed (e.g., determining level of alignment between district's strategic priorities and actual resource allocation, ROI calculations where possible); will feed into budget preparation discussions.	Draft 2014-15 budget recommendations reflect significant steps to align resources needed to implement district's instructional priorities, and are based on analyses conducted in July-Oct 2013 and stakeholder engagement conducted in July-Dec 2013.	Draft 2014-15 budget submitted to the Board of Education reflects significant steps to align resources needed to implement district's instructional priorities.	Final 2014-15 budget (approved by both the Board and then by the County Commission) reflects significant steps to align resources needed to implement district's instructional priorities.	The work of implementing resource alignment opportunities agreed to in the 2014-15 budget begins.
Milestone 1-a						
Finalize programmatic areas for further investigation and hypothesis testing.	The KCS leadership team held a number of brainstorming sessions in April 2013 and arrived at a number of initial areas and hypotheses for investigation, laid out in the proposal itself.	KCS leadership prioritizes the questions / hypotheses that will inform resource allocation and student performance analysis.				
Milestone 1-b						
Complete all data collection and clean-up in order to begin detailed financial and resource allocation analysis.	Full data request has been shared with the district.	(1) KCS shares all relevant data. (2) ERS codes data according to its framework and clarifies / cleans any data issues encountered along the way. (3) In the course of its Strategic Mapping Process, ERS flags any areas where financial or HR data should be tagged differently to enable analysis in future years.	The process of tagging financial and HR data (if applicable) begins.	The process of tagging financial and HR data (if applicable) continues.	The process of tagging financial and HR data (if applicable) is completed.	

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Milestone 1-c							
Prioritize specific areas as resource alignment opportunities.	The KCS leadership team hypothesizes that the degree of alignment between district priorities and resource alignment is relatively strong, but needs to test this through ERS's Strategic Resource Map.	(1) ERS and Parthenon develop a comprehensive report which paints a clear picture of current resource allocation, including: where and how funds are spent, by school, program, service, and potentially even by type of student. (2) KCS develops a deep understanding of the degree of alignment between district strategic priorities and current resource allocation.	(1) KCS prioritizes specific areas as resource alignment opportunities. (2) KCS and Parthenon develop a "phasing" plan (when each opportunity might be addressed in the 3-5 year plan. (3) KCS and Parthenon identify areas most likely to be reflected in the 2014-15 budget. (4) KCS shares recommendations with stakeholders for input and reactions. (5) KCS leadership team finalizes which programmatic areas will be deprioritized or discontinued, and which areas will receive additional investment.	(1) All agreed upon resource alignment opportunities are reflected in Strategic Planning document that will be finalized in early Spring. (2) A substantial portion of resource alignment opportunities prioritized for 2014-15 (with input from stakeholders) are reflected in the preliminary budget.	A substantial portion of resource alignment opportunities prioritized for 2014-15 are captured in the final budget that is approved for KCS.	Work on implementing agreed upon resource alignment opportunities begins.	
Milestone 1-d							
Complete a Time Audit of key instructional positions.	The KCS does not have enough information today to determine how key instructional positions spend their time.	(1) KCS and Parthenon develop a time audit instrument (survey) for selected instructional positions. (2) Parthenon conducts interviews with 10-15 principals to refine survey approach. (3) Parthenon conducts survey and analyzes results.	(1) Results of the survey are combined with the financial analysis and student performance analysis to make recommendations about potential changes to responsibilities/loads, support structures and processes. (2) Key findings are incorporated into discussions with stakeholders, as appropriate.	Survey tool and documented methodology are handed off to KCS (with training, as needed) and become part of the KCS' portfolio of tools, to be used as needed in future years.			
Milestone 1-e							
Complete student performance analysis (by school and for selected programs) and eROI analysis.	The KCS has conducted some of this analysis already for the recent ROI analysis (Appendix F), but at a higher level and is now looking for more detail.	(1) Student performance data, by school (and program/ initiative, where possible) is collected and analyzed . (2) ROI calculated for selected programs, initiatives, and school models (where possible).	(1) Key ROI findings are incorporated into discussions with stakeholders, for input and reactions. (2) ROI findings are also used as a key input to making preliminary 2014-15 budget recommendations/ decisions. (3) ROI methodology is documented for KCS future use.	Relevant KCS staff are trained (as needed) in the use of the ROI methodology. The framework becomes part of the tool portfolio at the disposal of the KCS for use in future budget cycles, as needed.			

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Milestone 1-f						
Develop and execute Stakeholder Engagement Plan.	The KCS leadership team has the benefit of prior planning processes on which it can draw (2008 CORRE report and 2009 Strategic Planning Process described in detail in the proposal). Stakeholder engagement in the resource allocation work would follow a similar pattern.	(1) Director of Strategic Planning brought on board. (2) Mapping of stakeholders and outreach strategy to each group completed. (3) Outreach to stakeholders initiated. (4) Stakeholder engagement begins in August (input sessions) and continues in September.	(1) Input sessions continue in September/October. (2) Change management sessions (discussions of analysis and early recommendations) begin in October and continue through November. (3) Stakeholder feedback incorporated in preliminary budget recommendations in December.	(1) Strategic planning process continues to share intended strategic (and budget) recommendations with stakeholders. (2) Annual State of the Schools Address (Jan/Feb) reflects stakeholder input. (3) Preliminary budget submitted to the Board of Education.	(1) Budget approved by the Board and submitted to County Mayor. (2) County-wide budget recommendations made by the County Commission and public budget hearings. (3) Any proposed revisions to KCS budget shared with the KCS. (4) Final KCS budget approved by the County Commission as part of the county-wide budget and capital plan. (5) Next round of stakeholder engagement meetings initiated to develop detailed implementation plan to accompany new Strategic Plan.	Updates shared with stakeholders on a regular basis, via most appropriate communication vehicles.
Milestone 1-g						
Finalize a Personalized Learning strategy for the district, with cost implications included, both for the 2014-15 budget and for the five-year strategic finance plan.	The KCS has done some high level benchmarking of personalized learning best practices and costs, and is moving ahead with an 11-school pilot, but needs more information to develop a district-wide adoption plan.	(1) Most promising external models in personalized learning (including cost requirements of each model) synthesized. (2) Assessment of KCS' current capabilities in this area begins.	(1) Assessment of KCS' current capabilities in this area and potential gaps (infrastructure, etc.) completed. (2) Personalized learning strategy recommendations finalized, including cost implications for 2014-15 and beyond.	The 2014-15 budget proposed to the Board of Education includes initial investments targeted at deploying a personalized learning strategy more broadly across the district.	The 2014-15 budget submitted to and approved by the County Commission includes initial investments targeted at deploying a personalized learning strategy more broadly across the district.	Implementation of personalized learning strategy begins.
(Anticipated) External Challenges or Factors						
The bandwidth of the KCS staff, especially senior leadership, to devote time to both the analysis work (discussion of analyses, action planning) and simultaneous stakeholder engagement. The KCS will overcome the issue of resource mapping and analytical bandwidth through outside partners (Parthenon and ERS). And on the stakeholder engagement side, KCS has created a temporary position (Director of Strategic Planning) and has already filled this position with an Ed.L.D. resident who will be dedicated full-time to coordinating the strategic planning effort on behalf of the district. In May-July 2013, the KCS senior leadership team will come together, as they did for the 2008 CORRE report and for the 2009 strategic plan, to create an intentional mapping of internal district facilitators against stakeholder meetings and focus groups. The KCS will also turn to strong external partners (Great Schools Partnership and the Knoxville Chamber) for help with facilitating meetings, especially meetings with the business community, to augment the capacity of the district.						

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		Period 1	Period 2	Period 3	Period 4	Period 5
OUTCOME 2						
Knox County Schools develops a 3- to 5-year strategic finance plan that incorporates the district's programmatic priorities, the cost of implementing these priorities, and has a clear implementation plan to achieve these priorities within a 5-year timeframe (including key activities and activity owners).	The KCS does not currently have a strategic finance plan to support its strategic plan. This outcome coincides well with the fact that the KCS will be refreshing its Strategic Plan this year. The Strategic Plan will drive the 5-year Finance Plan.	Groundwork laid for capturing key resource alignment priorities, costs associated with growing particular initiatives, and identification of initiatives which can be deprioritized over time (become funding sources for other initiatives).	Outline (main components) of the 5-year Strategic Finance Plan drafted - includes strategic priorities, total estimated costs, high level roadmap of when costs would be incurred (how they would be spread over the 5-year period), and high-level implementation plan.	Additional stakeholder input collected, and more detailed implementation plan development begins, with support from a variety of district stakeholders (following best practice established during prior iteration of the strategic planning process).	Finalized Strategic Finance Plan, with more detailed implementation plan (developed with stakeholder input) for Year 1 (2014-15) and key milestones for the years beyond 2014-15.	Work on implementing agreed upon resource alignment opportunities in the f-year Strategic Finance Plan begins.
Milestone 2-a						
Agree on how resource alignment opportunities will be phased in over the five-year period.	While the KCS leadership has discussed resource alignment opportunities at a high level, the analysis has not yet been conducted to determine whether these opportunities are real. Once the analysis is done, the KCS leadership will have these discussions.	(1) ERS and Parthenon develop a comprehensive report which paints a clear picture of current resource allocation, including: where and how funds are spent, by school, program, service, and potentially even by type of student. (2) KCS develops a deep understanding of the degree of alignment between district strategic priorities and current resource allocation.	(1) KCS prioritizes specific areas as resource alignment opportunities. (2) KCS and Parthenon identify areas most likely to be reflected in the 2014-15 budget. (3) KCS and Parthenon develop a "phasing" plan for the resource alignment opportunities (when each opportunity might be addressed in the 5-year plan). (4) Based on internal discussions and stakeholder input, KCS leadership team finalizes which programmatic areas will be deprioritized or discontinued, and which areas will receive additional investment over the 3-5 year period. (5) KCS and Parthenon draft a preliminary 5-year finance plan that reflects the phasing in of resource alignment opportunities.	(1) All agreed upon resource alignment opportunities are reflected in Strategic Planning document that will be finalized in early Spring. (2) A substantial portion of resource alignment opportunities prioritized for 2014-15 (with input from stakeholders) are reflected in the preliminary budget. (3) The draft 3-5 year finance plan is updated to reflect any changes in approach/ phasing that occurred between December 2013 and March 2014.	(1) A substantial portion of resource alignment opportunities prioritized for 2014-15 are captured in the final budget that is approved for KCS. (2) The 3-5 year finance plan is finalized and reflects any additional changes in approach/ phasing that occurred between March and June 2014.	Work on implementing agreed upon resource alignment opportunities begins.

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Milestone 2-b						
Develop detailed cost implications of recommended changes (e.g., for areas where additional investments may need to be made).	While the KCS leadership has discussed resource alignment opportunities at a high level, the analysis has not yet been conducted to determine whether these opportunities are real. Once the analysis is done, Parthenon will assist the KCS leadership in developing the cost implications of moving ahead with various changes.	Work to develop cost implications of recommended changes begins.	Cost implications of recommended changes finalized and incorporated into the 2014-15 budget recommendations and the 5-year finance plan.	Cost implications updated as appropriate (if adjusting approach/scale/phasing post feedback from stakeholders).	Cost implications updated as appropriate (if adjusting approach/scale/phasing post feedback from stakeholders). Decisions incorporated into the final 5-year finance plan.	Work on implementing agreed upon resource alignment opportunities begins (district begins to redeploy funding from some initiatives to others).
Milestone 2-c						
Develop detailed implementation plan for 2014-14 school year and higher level milestones for years beyond 2014-15.	The KCS has a strong record of setting performance targets and developing actionable implementation plans to achieve these targets. The KCS will apply the same rigorous and inclusive approach to this process (will involve relevant stakeholders in the development of detailed implementation plans).	Information collected from KCS leadership and any stakeholder meetings that may help inform the creation of a high-level implementation plan.	High-level implementation plan drafted, with key activities and activity owners, for vetting with Project Working Group and Steering Committee. Feedback from Project Working Group and Steering Committee. Incorporated into next iteration of implementation plan.	District sets up a stakeholder engagement process to flesh out the implementation plan in more detail and shares process with broader district community.	Implementation plan finalized through stakeholder engagement process (with greater level of detail for 2014-15 and lower level of detail for the years beyond 2014-15), and incorporated into the final strategic finance plan.	Implementation of activities outlined in the plan begins.
Milestone 2-d						
Finalize a Personalized Learning strategy for the district, with cost implications included, both for the 2014-15 budget and for the five-year strategic finance plan.	The KCS has done some high level benchmarking of personalized learning best practices and costs, and is moving ahead with an 11-school pilot, but needs more information to develop a district-wide adoption plan.	(1) Most promising external models in personalized learning (including cost requirements of each model) synthesized. (2) Assessment of KCS' current capabilities in this area begins.	(1) Assessment of KCS' current capabilities in this area and potential gaps (infrastructure, etc.) completed. (2) Personalized learning strategy recommendations finalized, including cost implications for 2014-15 and beyond. (3) The draft strategic finance plan includes a roadmap for the KCS to follow toward a vision of personalized learning for all students over five years, includes the cost implications of doing so, and identifies sources of funds (where will dollars be found) to support the strategy.	(1) The 2014-15 budget proposed to the Board of Education includes initial investments targeted at deploying a personalized learning strategy more broadly across the district. (2) The longer roadmap in the draft finance plan is updated, as needed, based on additional stakeholder input.	(1) The 2014-15 budget submitted to and approved by the County Commission includes initial investments targeted at deploying a personalized learning strategy more broadly across the district. (2) The finalized strategic finance plan lays out the finalized roadmap for the KCS to move toward a vision of personalized learning for all students over five years.	Implementation of personalized learning strategy begins.

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**(Anticipated) External
Challenges or Factors**

Over the course of the project, it will be important to make the time not only to conduct the analysis, create a solid factbase, understand the implications, and develop action plans, but also to create a genuine dialog around the initial findings and recommendations. The analyses may well lead to recommendations that are not universally accepted by stakeholders. The KCS will work closely with its partners, Parthenon and ERS, to develop a factbase of critical information on each major resource allocation topic. The goal will be to create a common understanding of the facts among stakeholders, and to have all discussions be informed and driven by data, to the extent possible. Getting to this level of stakeholder engagement will be necessary to get to an actionable 5-year plan.

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		Period 1	Period 2	Period 3	Period 4	Period 5
OUTCOME 3						
The KCS leadership will be a) willing to continue the resource alignment work, b) understand what needs to be done annually as part of the work, c) will have begun to develop/acquire skillsets necessary to do the work on an ongoing basis, and 2) will have a plan to fill in remaining capacity gaps.	The KCS leadership is already quite committed to the work, as illustrated by the execution against the 2009 strategic plan, the aggressive cost management practices, by investment of time and resources into the ROI study, and by follow-through on key recommendations of this study. A preliminary assessment of KCS' capacity to execute this work on its own is provided in Criterion 5 of the proposal.	The KCS leadership identifies capacity gaps, and builds a plan with support from Parthenon to address the gaps. This includes both determination whether any additional staff are needed as well as the development / revision of existing processes (e.g., annual planning and budgetary process) to ensure that programmatic evaluations and resource allocation decisions are intimately linked.	The KCS leadership adjusts the capacity-building plan, as needed, based on any additional information that is acquired through the analysis, planning, and stakeholder engagement activities.	The KCS leadership begins to address identified capacity gaps through either process, additional staff, or additional training solutions.	The KCS leadership continues to address identified capacity gaps through either process, additional staff, or additional training solutions.	The KCS now has a revamped planning and budgetary process it can begin implementing in the fall of 2014.
Milestone 3-a						
Complete organizational review of key functions	The KCS has a lean central office and has some initial ideas about where skill gaps might reside, but this has not been synthesized / looked at in the aggregate.	(1) One-on-one interviews with senior KCS leadership and any middle management staff identified by leadership completed. (2) Organizational themes from these interviews synthesized and translated into preliminary capacity-building recommendations, reviewed with KCS leadership team. (3) KCS capacity building plan finalized by end of August.	Modifications made to capacity building plan, as needed.	Modifications made to capacity building plan, as needed.	Modifications made to capacity building plan, as needed.	Modifications made to capacity building plan, as needed.

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Milestone 3-b						
Make changes to current planning and budgetary processes.	The KCS has a budget development and adoption process, but the various evaluation and continuous improvement processes occurring in different pockets in the district do not necessarily connect well with the budgetary process.	Detailed understanding of current planning and budgetary processes and potential shortcomings developed in detail (through interviews with key central office staff).	Draft recommendations on strategy review, planning and budgetary process improvements developed and vetted with KCS leadership team. Agreement on changes to processes that can be incorporated immediately vs. changes that may need to occur in the 2014-15 school year.	Immediate changes to processes that had been agreed upon with the district are acted upon	Immediate changes to processes that had been agreed upon with the district are acted upon	More comprehensive changes to processes begin with the 2014-15 school year.
Milestone 3-c						
Create a simple tool for the KCS to measure their progress in building capacity.	This does not exist today.	Short "pulse survey" developed to assess KCS senior leadership attitudes toward resource allocation work, level of understanding of what needs to be done, and perceptions of individual and team ability to get the work done. Pulse survey launched in July for the first time to create baseline, and repeated in September.	Pulse survey repeated toward end of quarter. Survey results used to brainstorm potential modifications to capacity building plan or processes.	Pulse survey repeated toward end of quarter. Survey results used to brainstorm potential modifications to capacity building plan or processes.	Pulse survey repeated toward end of quarter. Survey results used to brainstorm potential modifications to capacity building plan or processes.	Pulse survey repeated toward end of quarter. Survey results used to brainstorm potential modifications to capacity building plan or processes.
Milestone 3-d						
Identify resources for additional staff (if needed).	The KCS has a very lean central office; we may find over the course of the project, that the KCS needs to augment central office staff with a few more staff, with specific skillsets.	Milestone 3-a determines whether additional staff might be needed in certain areas.	(1) Sources of immediate funding, if applicable, identified (e.g., to enable hiring before the next fiscal year, if needed). (2) Sources of longer-term funding for additional staff identified for subsequent fiscal years (re-allocation from other line items vs incremental funding). (3) Operating costs associated with additional staff in specific functions and funding sources included in the draft 2014-15 budget.			

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Milestone 3-e						
Hire additional staff (if needed).	The KCS has a very lean central office; we may find over the course of the project, that the KCS needs to augment central office staff with a few more staff, with specific skillsets.	Milestone 3-a determines whether additional staff might be needed in certain areas.	(1) Milestone 3-d identifies sources of funding and determines what hiring timeline is feasible (from budget perspective). (2) In addition, interviews and day-to-day observations/ analysis of resource alignment activities allow KCS leadership and Parthenon to determine whether any responsibilities need to be reallocated within existing district staff (senior leadership and middle management) to make the workload sustainable. (3) Draft job descriptions are developed for any additional staff needed by the district	(1) Immediate hires made (assuming funding sources have been identified and are available in the immediate term). (2) Internal reallocation of responsibilities begins, if applicable.	(1) Internal reallocation of responsibilities, if applicable, completed. (2) Job descriptions for remaining additional staff finalized.	(1) Remaining new positions filled. (2) New staff trained on relevant tools/analyses/ processes as part of an onboarding process.
Milestone 3-f						
Educate the KCS leadership on resource allocations tools/ analyses.	The KCS is not yet familiar with the tools/analyses that Parthenon and ERS will utilize during this project.	(1) Key tools and analyses applied by ERS and Parthenon as part of the resource alignment work (e.g., Strategic Resource Mapping, Time Audit, ROI). (2) KCS Project Working Group consulted on methodologies throughout the project.	(1) Agreement on priority metrics that will be tracked annually to inform resource alignment over time. (2) Summary documents created that outline approaches/ methodologies of various analyses conducted throughout the project. (3) All analyses (data files) and methodology summaries handed off to the KCS. (4) Designated KCS staff (targeted number) trained on key analyses and methodologies.	Additional training (on tools and methodologies) provided to designated (existing) KCS staff as needed as well as to any new hires (if applicable)	Additional training (on tools and methodologies) provided to designated (existing) KCS staff as needed as well as to any new hires (if applicable)	Additional training (on tools and methodologies) provided to designated (existing) KCS staff as needed as well as to any new hires (if applicable)
(Anticipated) External Challenges or Factors						
Implementation Risk. The KCS together with Parthenon will design an improved process, but implementation of this process will depend on the district's ability to protect this as a priority and to guard against other priorities or "fire drills" displacing this on the priority list. The KCS will attempt to overcome this by assigning primary responsibility for the overarching continuous improvement process to a specific functional area which will act as the “owner” or “coordinator.” Which group / individuals will drive the process(es) going forward will be determined as part of the project. Once the roles of senior district leadership in this process are better defined, they too will be become part of an accountability system (i.e., become part of “management objectives” against which performance is evaluated annually).						

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Instructions for documenting progress towards outcomes:
1) Complete the yellow cells with your Actual Progress or Completion for this reporting period. Include one to two points on your progress for each outcome and each milestone.
2) If your Anticipated Progress or Completion has changed for future periods, please update it on the chart below (columns F through I).
3) If changed, please update the "(Anticipated) External Challenges or Factors" section at the bottom of the chart.

NOTE: This spreadsheet is designed to populate with data from either the "Proposed Outcomes & Milestones" tab or from the last completed "Period X Report" tab. Formulas are included in all cells except the yellow cells. If you need to overwrite your Anticipated Progress or Completion for future periods or your External Challenges or Factors, click on the cell once and type in your text. You should overwrite any formulas in those cells. The next reporting period will populate with this text in the appropriate cell.

	Baseline	Anticipated Progress or Completion	Actual Progress or Completion	Anticipated Progress or Completion			
		Period 1	Period 1	Period 2	Period 3	Period 4	Period 5
OUTCOME 1							
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Milestone 1-b							
Complete all data collection and clean-up in order to begin detailed financial and resource allocation analysis.	Full data request has been shared with the district.	(1) KCS shares all relevant data. (2) ERS codes data according to its framework and clarifies / cleans any data issues		The process of tagging financial and HR data (if applicable) begins.	The process of tagging financial and HR data (if applicable) continues.	The process of tagging financial and HR data (if applicable) is completed.	
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(Anticipated) External Challenges or Factors							
The bandwidth of the KCS staff, especially senior leadership, to devote time to both the analysis work (discussion of analyses, action planning) and simultaneous stakeholder engagement. The KCS will overcome the issue of resource mapping and analytical bandwidth through outside partners (Parthenon and ERS). And on the stakeholder engagement side, KCS has created a temporary position (Director of Strategic Planning) and has already filled this position with an Ed.L.D. resident who will be dedicated full-time to coordinating the strategic planning effort on behalf of the district. In May-July 2013, the KCS senior leadership team will come together, as they did for the 2008 CORRE report and for the 2009 strategic plan, to create an intentional mapping of internal district facilitators against stakeholder meetings and focus groups. The KCS will also turn to strong external partners (Great Schools Partnership and the Knoxville Chamber) for help with facilitating meetings, especially meetings with the business community, to augment the capacity of the district.							

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		Period 1	Period 1	Period 2	Period 3	Period 4	Period 5
OUTCOME 2							
Knox County Schools develops a 3- to 5-year strategic finance plan that incorporates the district's programmatic priorities, the cost of implementing these priorities, and has a clear implementation plan to achieve these priorities within a 5-year timeframe (including key activities and activity owners).	The KCS does not currently have a strategic finance plan to support its strategic plan. This outcome coincides well with the fact that the KCS will be refreshing its Strategic Plan this year. The Strategic Plan will drive the 5-year Finance Plan.	Groundwork laid for capturing key resource alignment priorities, costs associated with growing particular initiatives, and identification of initiatives which can be deprioritized over time (become funding sources for other initiatives).		Outline (main components) of the 5-year Strategic Finance Plan drafted - includes strategic priorities, total estimated costs, high level roadmap of when costs would be incurred (how they would be spread over the 5-year period), and high-level implementation plan.	Additional stakeholder input collected, and more detailed implementation plan development begins, with support from a variety of district stakeholders (following best practice established during prior iteration of the strategic planning process).	Finalized Strategic Finance Plan, with more detailed implementation plan (developed with stakeholder input) for Year 1 (2014-15) and key milestones for the years beyond 2014-15.	Work on implementing agreed upon resource alignment opportunities in the f-year Strategic Finance Plan begins.
Milestone 2-a							
Agree on how resource alignment opportunities will be phased in over the five-year period.	While the KCS leadership has discussed resource alignment opportunities at a high level, the analysis has not yet been conducted to determine whether these opportunities are real. Once the analysis is done, the KCS leadership will have these discussions.	(1) ERS and Parthenon develop a comprehensive report which paints a clear picture of current resource allocation, including: where and how funds are spent, by school, program, service, and potentially even by type of student. (2) KCS develops a deep understanding of the degree of alignment between district strategic priorities and current resource allocation.		(1) KCS prioritizes specific areas as resource alignment opportunities. (2) KCS and Parthenon identify areas most likely to be reflected in the 2014-15 budget. (3) KCS and Parthenon develop a "phasing" plan for the resource alignment opportunities (when each opportunity might be addressed in the 5-year plan). (4) Based on internal discussions and stakeholder input, KCS leadership team finalizes which programmatic areas will be deprioritized or discontinued, and which areas will receive additional investment over the 3-5 year period. (5) KCS and Parthenon draft a preliminary 5-year finance plan that reflects the phasing in of resource alignment opportunities.	(1) All agreed upon resource alignment opportunities are reflected in Strategic Planning document that will be finalized in early Spring. (2) A substantial portion of resource alignment opportunities prioritized for 2014-15 (with input from stakeholders) are reflected in the preliminary budget. (3) The draft 3-5 year finance plan is updated to reflect any changes in approach/ phasing that occurred between December 2013 and March 2014.	(1) A substantial portion of resource alignment opportunities prioritized for 2014-15 are captured in the final budget that is approved for KCS. (2) The 3-5 year finance plan is finalized and reflects any additional changes in approach/ phasing that occurred between March and June 2014.	Work on implementing agreed upon resource alignment opportunities begins.
Milestone 2-b							
Develop detailed cost implications of recommended changes (e.g., for areas where additional investments may need to be made).	While the KCS leadership has discussed resource alignment opportunities at a high level, the analysis has not yet been	Work to develop cost implications of recommended changes begins.		Cost implications of recommended changes finalized and incorporated into the 2014-15 budget recommendations and the	Cost implications updated as appropriate (if adjusting approach/scale/phasing post feedback from stakeholders).	Cost implications updated as appropriate (if adjusting approach/scale/phasing post feedback from stakeholders).	Work on implementing agreed upon resource alignment opportunities begins (district begins to redeploy funding from
Milestone 2-c							
Develop detailed implementation plan for 2014-14 school year and higher level milestones for years beyond 2014-15.	The KCS has a strong record of setting performance targets and developing actionable implementation plans to achieve	Information collected from KCS leadership and any stakeholder meetings that may help inform the creation of a high-level		High-level implementation plan drafted, with key activities and activity owners, for vetting with Project Working Group and	District sets up a stakeholder engagement process to flesh out the implementation plan in more detail and shares process with	Implementation plan finalized through stakeholder engagement process (with greater level of detail for 2014-15 and lower level	Implementation of activities outlined in the plan begins.
Milestone 2-d							

APPENDIX A: OUTCOMES AND MILESTONES CHART							BILL & MELINDA GATES foundation
Finalize a Personalized Learning strategy for the district, with cost implications included, both for the 2014-15 budget and for the five-year strategic finance plan.	The KCS has done some high level benchmarking of personalized learning best practices and costs, and is moving ahead with an 11-school pilot, but needs more information to develop a district-wide adoption plan.	(1) Most promising external models in personalized learning (including cost requirements of each model) synthesized. (2) Assessment of KCS' current capabilities in this area begins.		(1) Assessment of KCS' current capabilities in this area and potential gaps (infrastructure, etc.) completed. (2) Personalized learning strategy recommendations finalized, including cost implications for 2014-15 and beyond. (3) The draft strategic finance plan includes a roadmap for the KCS to follow toward a vision of personalized learning for all students over five years, includes the cost implications of doing so, and identifies sources of funds (where will dollars be found) to support the strategy.	(1) The 2014-15 budget proposed to the Board of Education includes initial investments targeted at deploying a personalized learning strategy more broadly across the district. (2) The longer roadmap in the draft finance plan is updated, as needed, based on additional stakeholder input.	(1) The 2014-15 budget submitted to and approved by the County Commission includes initial investments targeted at deploying a personalized learning strategy more broadly across the district. (2) The finalized strategic finance plan lays out the finalized roadmap for the KCS to move toward a vision of personalized learning for all students over five years.	Implementation of personalized learning strategy begins.
(Anticipated) External Challenges or Factors							
Over the course of the project, it will be important to make the time not only to conduct the analysis, create a solid factbase, understand the implications, and develop action plans, but also to create a genuine dialog around the initial findings and recommendations. The analyses may well lead to recommendations that are not universally accepted by stakeholders. The KCS will work closely with its partners, Parthenon and ERS, to develop a factbase of critical information on each major resource allocation topic. The goal will be to create a common understanding of the facts among stakeholders, and to have all discussions be informed and driven by data, to the extent possible. Getting to this level of stakeholder engagement will be necessary to get to an actionable 5-year plan.							

APPENDIX A: OUTCOMES AND MILESTONES CHART

	Baseline	Anticipated Progress or Completion	Actual Progress or Completion	Anticipated Progress or Completion			
		Period 1	Period 1	Period 2	Period 3	Period 4	Period 5
OUTCOME 3							
The KCS leadership will be a) willing to continue the resource alignment work, b) understand what needs to be done annually as part of the work, c) will have begun to develop/acquire skillsets necessary to do the work on an ongoing basis, and 2) will have a plan to fill in remaining capacity gaps.	The KCS leadership is already quite committed to the work, as illustrated by the execution against the 2009 strategic plan, the aggressive cost management practices, by investment of time and resources into the ROI study, and by follow-through on key recommendations of this study. A preliminary assessment of KCS' capacity to execute this work on its own is provided in Criterion 5 of the proposal.	The KCS leadership identifies capacity gaps, and builds a plan with support from Parthenon to address the gaps. This includes both determination whether any additional staff are needed as well as the development / revision of existing processes (e.g., annual planning and budgetary process) to ensure that programmatic evaluations and resource allocation decisions are intimately linked.		The KCS leadership adjusts the capacity-building plan, as needed, based on any additional information that is acquired through the analysis, planning, and stakeholder engagement activities.	The KCS leadership begins to address identified capacity gaps through either process, additional staff, or additional training solutions.	The KCS leadership continues to address identified capacity gaps through either process, additional staff, or additional training solutions.	The KCS now has a revamped planning and budgetary process it can begin implementing in the fall of 2014.
Milestone 3-a							
Complete organizational review of key functions	The KCS has a lean central office and has some initial ideas about where skill gaps might reside, but this has not been synthesized / looked at in the aggregate.	(1) One-on-one interviews with senior KCS leadership and any middle management staff identified by leadership completed. (2) Organizational themes from these interviews synthesized and translated into preliminary capacity-building recommendations, reviewed with KCS leadership team. (3) KCS capacity building plan finalized by end of August.		Modifications made to capacity building plan, as needed.	Modifications made to capacity building plan, as needed.	Modifications made to capacity building plan, as needed.	Modifications made to capacity building plan, as needed.
Milestone 3-b							
Make changes to current planning and budgetary processes.	The KCS has a budget development and adoption process, but the various evaluation and continuous improvement processes occurring in different pockets in the district do not necessarily connect well with the budgetary process.	Detailed understanding of current planning and budgetary processes and potential shortcomings developed in detail (through interviews with key central office staff).		Draft recommendations on strategy review, planning and budgetary process improvements developed and vetted with KCS leadership team. Agreement on changes to processes that can be incorporated immediately vs. changes that may need to occur in the 2014-15 school year.	Immediate changes to processes that had been agreed upon with the district are acted upon	Immediate changes to processes that had been agreed upon with the district are acted upon	More comprehensive changes to processes begin with the 2014-15 school year.
Milestone 3-c							

APPENDIX A: OUTCOMES AND MILESTONES CHART								BILL & MELINDA GATES foundation
Create a simple tool for the KCS to measure their progress in building capacity.	This does not exist today.	Short "pulse survey" developed to assess KCS senior leadership attitudes toward resource allocation work, level of understanding of what needs to be done, and perceptions of individual and team ability to get the work done. Pulse survey launched in July for the first time to create baseline, and repeated in September.		Pulse survey repeated toward end of quarter. Survey results used to brainstorm potential modifications to capacity building plan or processes.	Pulse survey repeated toward end of quarter. Survey results used to brainstorm potential modifications to capacity building plan or processes.	Pulse survey repeated toward end of quarter. Survey results used to brainstorm potential modifications to capacity building plan or processes.	Pulse survey repeated toward end of quarter. Survey results used to brainstorm potential modifications to capacity building plan or processes.	
Milestone 3-d								
Identify resources for additional staff (if needed).	The KCS has a very lean central office; we may find over the course of the project, that the KCS needs to augment central office staff with a few more staff, with specific skillsets.	Milestone 3-a determines whether additional staff might be needed in certain areas.		(1) Sources of immediate funding, if applicable, identified (e.g., to enable hiring before the next fiscal year, if needed). (2) Sources of longer-term funding for additional staff identified for subsequent fiscal years (re-allocation from other line items vs incremental funding). (3) Operating costs associated with additional staff in specific functions and funding sources included in the draft 2014-15 budget.				
Milestone 3-e								
Hire additional staff (if needed).	The KCS has a very lean central office; we may find over the course of the project, that the KCS needs to augment central office staff with a few more staff, with specific skillsets.	Milestone 3-a determines whether additional staff might be needed in certain areas.		(1) Milestone 3-d identifies sources of funding and determines what hiring timeline is feasible (from budget perspective). (2) In addition, interviews and day-to-day observations/ analysis of resource alignment activities allow KCS leadership and Parthenon to determine whether any responsibilities need to be reallocated within existing district staff (senior leadership and middle management) to make the workload sustainable. (3) Draft job descriptions are developed for any additional staff needed by the district	(1) Immediate hires made (assuming funding sources have been identified and are available in the immediate term). (2) Internal reallocation of responsibilities begins, if applicable.	(1) Internal reallocation of responsibilities, if applicable, completed. (2) Job descriptions for remaining additional staff finalized.	(1) Remaining new positions filled. (2) New staff trained on relevant tools/analyses/ processes as part of an onboarding process.	
Milestone 3-f								

APPENDIX A: OUTCOMES AND MILESTONES CHART							BILL & MELINDA GATES foundation
Educate the KCS leadership on resource allocations tools/ analyses.	The KCS is not yet familiar with the tools/analyses that Parthenon and ERS will utilize during this project.	(1) Key tools and analyses applied by ERS and Parthenon as part of the resource alignment work (e.g., Strategic Resource Mapping, Time Audit, ROI). (2) KCS Project Working Group consulted on methodologies throughout the project.		(1) Agreement on priority metrics that will be tracked annually to inform resource alignment over time. (2) Summary documents created that outline approaches/ methodologies of various analyses conducted throughout the project. (3) All analyses (data files) and methodology summaries handed off to the KCS. (4) Designated KCS staff (targeted number) trained on key analyses and methodologies.	Additional training (on tools and methodologies) provided to designated (existing) KCS staff as needed as well as to any new hires (if applicable)	Additional training (on tools and methodologies) provided to designated (existing) KCS staff as needed as well as to any new hires (if applicable)	Additional training (on tools and methodologies) provided to designated (existing) KCS staff as needed as well as to any new hires (if applicable)
(Anticipated) External Challenges or Factors							
Implementation Risk. The KCS together with Parthenon will design an improved process, but implementation of this process will depend on the district's ability to protect this as a priority and to guard against other priorities or "fire drills" displacing this on the priority list. The KCS will attempt to overcome this by assigning primary responsibility for the overarching continuous improvement process to a specific functional area which will act as the “owner” or “coordinator.” Which group / individuals will drive the process(es) going forward will be determined as part of the project. Once the roles of senior district leadership in this process are better defined, they too will be become part of an accountability system (i.e., become part of “management objectives” against which performance is evaluated annually).							

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	Baseline	Actual Progress or Completion	Anticipated Progress or Completion	Actual Progress or Completion	Anticipated Progress or Completion		
		Period 1	Period 2	Period 2	Period 3	Period 4	Period 5
OUTCOME 1							
Knox County Schools adopts a 2014-15 budget that reflects significant steps to align resources needed to implement the instructional strategies desired by the KCS leadership.	The 2014-15 budget development cycle has not yet begun. Steps to identify resource alignment opportunities to maximize funding for highest impact areas have not yet been taken.		Draft 2014-15 budget recommendations reflect significant steps to align resources needed to implement district's instructional priorities, and are based on analyses conducted in July-Oct 2013 and stakeholder engagement conducted in July-Dec 2013.		Draft 2014-15 budget submitted to the Board of Education reflects significant steps to align resources needed to implement district's instructional priorities.	Final 2014-15 budget (approved by both the Board and then by the County Commission) reflects significant steps to align resources needed to implement district's instructional priorities.	The work of implementing resource alignment opportunities agreed to in the 2014-15 budget begins.
Milestone 1-a							
Finalize programmatic areas for further investigation and hypothesis testing.	The KCS leadership team held a number of brainstorming sessions in April 2013 and arrived at a number of initial areas and hypotheses for investigation, laid out in the proposal itself.						
Milestone 1-b							
Complete all data collection and clean-up in order to begin detailed financial and resource allocation analysis.	Full data request has been shared with the district.		The process of tagging financial and HR data (if applicable) begins.		The process of tagging financial and HR data (if applicable) continues.	The process of tagging financial and HR data (if applicable) is completed.	
Milestone 1-c							

APPENDIX A: OUTCOMES AND MILESTONES CHART

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	Baseline	Actual Progress or Completion	Anticipated Progress or Completion	Actual Progress or Completion	Anticipated Progress or Completion		
		Period 1	Period 2	Period 2	Period 3	Period 4	Period 5
OUTCOME 2							
Knox County Schools develops a 3- to 5-year strategic finance plan that incorporates the district's programmatic priorities, the cost of implementing these priorities, and has a clear implementation plan to achieve these priorities within a 5-year timeframe (including key activities and activity owners).	The KCS has a strong record of setting performance targets and developing actionable implementation plans to achieve these targets. The KCS will apply the same rigorous and inclusive approach to this process (will involve relevant stakeholders in the development of detailed implementation plans).		Outline (main components) of the 5-year Strategic Finance Plan drafted - includes strategic priorities, total estimated costs, high level roadmap of when costs would be incurred (how they would be spread over the 5-year period), and high-level implementation plan.		Additional stakeholder input collected, and more detailed implementation plan development begins, with support from a variety of district stakeholders (following best practice established during prior iteration of the strategic planning process).	Finalized Strategic Finance Plan, with more detailed implementation plan (developed with stakeholder input) for Year 1 (2014-15) and key milestones for the years beyond 2014-15.	Work on implementing agreed upon resource alignment opportunities in the f-year Strategic Finance Plan begins.
Milestone 2-a							
Agree on how resource alignment opportunities will be phased in over the five-year period.	While the KCS leadership has discussed resource alignment opportunities at a high level, the analysis has not yet been conducted to determine whether these opportunities are real. Once the analysis is done, the KCS leadership will have these discussions.		(1) KCS prioritizes specific areas as resource alignment opportunities. (2) KCS and Parthenon identify areas most likely to be reflected in the 2014-15 budget. (3) KCS and Parthenon develop a "phasing" plan for the resource alignment opportunities (when each opportunity might be addressed in the 5-year plan). (4) Based on internal discussions and stakeholder input, KCS leadership team finalizes which programmatic areas will be deprioritized or discontinued, and which areas will receive additional investment over the 3-5 year period. (5) KCS and Parthenon draft a preliminary 5-year finance plan that reflects the phasing in of resource alignment opportunities.		(1) All agreed upon resource alignment opportunities are reflected in Strategic Planning document that will be finalized in early Spring. (2) A substantial portion of resource alignment opportunities prioritized for 2014-15 (with input from stakeholders) are reflected in the preliminary budget. (3) The draft 3-5 year finance plan is updated to reflect any changes in approach/ phasing that occurred between December 2013 and March 2014.	(1) A substantial portion of resource alignment opportunities prioritized for 2014-15 are captured in the final budget that is approved for KCS. (2) The 3-5 year finance plan is finalized and reflects any additional changes in approach/ phasing that occurred between March and June 2014.	Work on implementing agreed upon resource alignment opportunities begins.
Milestone 2-b							
Develop detailed cost implications of recommended changes (e.g., for areas where additional investments may need to be made).	While the KCS leadership has discussed resource alignment opportunities at a high level, the analysis has not yet been conducted to determine whether these opportunities are real. Once the analysis is done, Parthenon will assist the KCS leadership in developing the cost implications of moving ahead with various changes.		Cost implications of recommended changes finalized and incorporated into the 2014-15 budget recommendations and the 5-year finance plan.		Cost implications updated as appropriate (if adjusting approach/scale/phasing post feedback from stakeholders).	Cost implications updated as appropriate (if adjusting approach/scale/phasing post feedback from stakeholders). Decisions incorporated into the final 5-year finance plan.	Work on implementing agreed upon resource alignment opportunities begins (district begins to redeploy funding from some initiatives to others).
Milestone 2-c							

	Baseline	Actual Progress or Completion	Anticipated Progress or Completion	Actual Progress or Completion	Anticipated Progress or Completion		
		Period 1	Period 2	Period 2	Period 3	Period 4	Period 5
OUTCOME 3							
The KCS leadership will be a) willing to continue the resource alignment work, b) understand what needs to be done annually as part of the work, c) will have begun to develop/acquire skillsets necessary to do the work on an ongoing basis, and 2) will have a plan to fill in remaining capacity gaps.	The KCS leadership is already quite committed to the work, as illustrated by the execution against the 2009 strategic plan, the aggressive cost management practices, by investment of time and resources into the ROI study, and by follow-through on key recommendations of this study. A preliminary assessment of KCS' capacity to execute this work on its own is provided in Criterion 5 of the proposal.		The KCS leadership adjusts the capacity-building plan, as needed, based on any additional information that is acquired through the analysis, planning, and stakeholder engagement activities.		The KCS leadership begins to address identified capacity gaps through either process, additional staff, or additional training solutions.	The KCS leadership continues to address identified capacity gaps through either process, additional staff, or additional training solutions.	The KCS now has a revamped planning and budgetary process it can begin implementing in the fall of 2014.
Milestone 3-a							
Complete organizational review of key functions	The KCS has a lean central office and has some initial ideas about where skill gaps might reside, but this has not been synthesized / looked at in the aggregate.		Modifications made to capacity building plan, as needed.		Modifications made to capacity building plan, as needed.	Modifications made to capacity building plan, as needed.	Modifications made to capacity building plan, as needed.
Milestone 3-b							
Make changes to current planning and budgetary processes.	The KCS has a budget development and adoption process, but the various evaluation and continuous improvement processes occurring in different pockets in the district do not necessarily connect well with the budgetary process.		Draft recommendations on strategy review, planning and budgetary process improvements developed and vetted with KCS leadership team. Agreement on changes to processes that can be incorporated immediately vs. changes that may need to occur in the 2014-15 school year.		Immediate changes to processes that had been agreed upon with the district are acted upon	Immediate changes to processes that had been agreed upon with the district are acted upon	More comprehensive changes to processes begin with the 2014-15 school year.
Milestone 3-c							
Create a simple tool for the KCS to measure their progress in building capacity.	This does not exist today.		Pulse survey repeated toward end of quarter. Survey results used to brainstorm potential modifications to capacity		Pulse survey repeated toward end of quarter. Survey results used to brainstorm potential modifications to capacity	Pulse survey repeated toward end of quarter. Survey results used to brainstorm potential modifications to capacity	Pulse survey repeated toward end of quarter. Survey results used to brainstorm potential modifications to capacity
Milestone 3-d							

APPENDIX A: OUTCOMES AND MILESTONES CHART

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		Period 1	Period 2	Period 3	Period 3	Period 4	Period 5
OUTCOME 1							
Knox County Schools adopts a 2014-15 budget that reflects significant steps to align resources needed to implement the instructional strategies desired by the KCS leadership.	The 2014-15 budget development cycle has not yet begun. Steps to identify resource alignment opportunities to maximize funding for highest impact areas have not yet been taken.			Draft 2014-15 budget submitted to the Board of Education reflects significant steps to align resources needed to implement district's instructional priorities.		Final 2014-15 budget (approved by both the Board and then by the County Commission) reflects significant steps to align resources needed to implement district's instructional priorities.	The work of implementing resource alignment opportunities agreed to in the 2014-15 budget begins.
Milestone 1-a							
Finalize programmatic areas for further investigation and hypothesis testing.	The KCS leadership team held a number of brainstorming sessions in April 2013 and arrived at a number of initial areas and hypotheses for investigation, laid out in the proposal itself.						
Milestone 1-b							
Complete all data collection and clean-up in order to begin detailed financial and resource allocation analysis.	Full data request has been shared with the district.			The process of tagging financial and HR data (if applicable) continues.		The process of tagging financial and HR data (if applicable) is completed.	
Milestone 1-c							
Prioritize specific areas as resource alignment opportunities.	The KCS leadership team hypothesizes that the degree of alignment between district priorities and resource alignment is relatively strong, but needs to test this through ERS's Strategic Resource Map.			(1) All agreed upon resource alignment opportunities are reflected in Strategic Planning document that will be finalized in early Spring. (2) A substantial portion of resource alignment opportunities prioritized for 2014-15 (with input from stakeholders) are reflected in the preliminary budget.		A substantial portion of resource alignment opportunities prioritized for 2014-15 are captured in the final budget that is approved for KCS.	Work on implementing agreed upon resource alignment opportunities begins.
Milestone 1-d							

APPENDIX A: OUTCOMES AND MILESTONES CHART								BILL & MELINDA GATES foundation
Complete a Time Audit of key instructional positions.	The KCS does not have enough information today to determine how key instructional positions spend their time.			Survey tool and documented methodology are handed off to KCS (with training, as needed) and become part of the KCS' portfolio of tools, to be used as needed in future years.				
Milestone 1-e								
Complete student performance analysis (by school and for selected programs) and eROI analysis.	The KCS has conducted some of this analysis already for the recent ROI analysis (Appendix F), but at a higher level and is now looking for more detail.			Relevant KCS staff are trained (as needed) in the use of the ROI methodology. The framework becomes part of the tool portfolio at the disposal of the KCS for use in future budget cycles, as needed.				
Milestone 1-f								
Develop and execute Stakeholder Engagement Plan.	The KCS leadership team has the benefit of prior planning processes on which it can draw (2008 CORRE report and 2009 Strategic Planning Process described in detail in the proposal). Stakeholder engagement in the resource allocation work would follow a similar pattern.			(1) Strategic planning process continues to share intended strategic (and budget) recommendations with stakeholders. (2) Annual State of the Schools Address (Jan/Feb) reflects stakeholder input. (3) Preliminary budget submitted to the Board of Education.		(1) Budget approved by the Board and submitted to County Mayor. (2) County-wide budget recommendations made by the County Commission and public budget hearings. (3) Any proposed revisions to KCS budget shared with the KCS. (4) Final KCS budget approved by the County Commission as part of the county-wide budget and capital plan. (5) Next round of stakeholder engagement meetings initiated to develop detailed implementation plan to accompany new Strategic Plan.	Updates shared with stakeholders on a regular basis, via most appropriate communication vehicles.	
Milestone 1-g								
Finalize a Personalized Learning strategy for the district, with cost implications included, both for the 2014-15 budget and for the five-year strategic finance plan.	The KCS has done some high level benchmarking of personalized learning best practices and costs, and is moving ahead with an 11-school pilot, but needs more information to develop a district-wide adoption plan.			The 2014-15 budget proposed to the Board of Education includes initial investments targeted at deploying a personalized learning strategy more broadly across the district.		The 2014-15 budget submitted to and approved by the County Commission includes initial investments targeted at deploying a personalized learning strategy more broadly across the district.	Implementation of personalized learning strategy begins.	
Anticipated External Challenges or Factors								
The bandwidth of the KCS staff, especially senior leadership, to devote time to both the analysis work (discussion of analyses, action planning) and simultaneous stakeholder engagement. The KCS will overcome the issue of resource mapping and analytical bandwidth through outside partners (Parthenon and ERS). And on the stakeholder engagement side, KCS has created a temporary position (Director of Strategic Planning) and has already filled this position with an Ed.L.D. resident who will be dedicated full-time to coordinating the strategic planning effort on behalf of the district. In May-July 2013, the KCS senior leadership team will come together, as they did for the 2008 CORRE report and for the 2009 strategic plan, to create an intentional mapping of internal district facilitators against stakeholder meetings and focus groups. The KCS will also turn to strong external partners (Great Schools Partnership and the Knoxville Chamber) for help with facilitating meetings, especially meetings with the business community, to augment the capacity of the district.								

	Baseline	Actual Progress or Completion	Actual Progress or Completion	Anticipated Progress or Completion	Actual Progress or Completion	Anticipated Progress or Completion	
		Period 1	Period 2	Period 3	Period 3	Period 4	Period 5
OUTCOME 2							
Knox County Schools develops a 3- to 5-year strategic finance plan that incorporates the district's programmatic priorities, the cost of implementing these priorities, and has a clear implementation plan to achieve these priorities within a 5-year timeframe (including key activities and activity owners).	The KCS does not currently have a strategic finance plan to support its strategic plan. This outcome coincides well with the fact that the KCS will be refreshing its Strategic Plan this year. The Strategic Plan will drive the 5-year Finance Plan.			Additional stakeholder input collected, and more detailed implementation plan development begins, with support from a variety of district stakeholders (following best practice established during prior iteration of the strategic planning process).		Finalized Strategic Finance Plan, with more detailed implementation plan (developed with stakeholder input) for Year 1 (2014-15) and key milestones for the years beyond 2014-15.	Work on implementing agreed upon resource alignment opportunities in the f-year Strategic Finance Plan begins.
Milestone 2-a							
Agree on how resource alignment opportunities will be phased in over the five-year period.	While the KCS leadership has discussed resource alignment opportunities at a high level, the analysis has not yet been conducted to determine whether these opportunities are real. Once the analysis is done, the KCS leadership will have these discussions.			(1) All agreed upon resource alignment opportunities are reflected in Strategic Planning document that will be finalized in early Spring. (2) A substantial portion of resource alignment opportunities prioritized for 2014-15 (with input from stakeholders) are reflected in the preliminary budget. (3) The draft 3-5 year finance plan is updated to reflect any changes in approach/ phasing that occurred between December 2013 and March 2014.		(1) A substantial portion of resource alignment opportunities prioritized for 2014-15 are captured in the final budget that is approved for KCS. (2) The 3-5 year finance plan is finalized and reflects any additional changes in approach/ phasing that occurred between March and June 2014.	Work on implementing agreed upon resource alignment opportunities begins.
Milestone 2-b							
Develop detailed cost implications of recommended changes (e.g., for areas where additional investments may need to be made).	While the KCS leadership has discussed resource alignment opportunities at a high level, the analysis has not yet been conducted to determine whether these opportunities are real. Once the analysis is done, Parthenon will assist the KCS leadership in developing the cost implications of moving ahead with various changes.			Cost implications updated as appropriate (if adjusting approach/scale/phasing post feedback from stakeholders).		Cost implications updated as appropriate (if adjusting approach/scale/phasing post feedback from stakeholders). Decisions incorporated into the final 5-year finance plan.	Work on implementing agreed upon resource alignment opportunities begins (district begins to redeploy funding from some initiatives to others).
Milestone 2-c							
Develop detailed implementation plan for 2014-14 school year and higher level milestones for years beyond 2014-15.	The KCS has a strong record of setting performance targets and developing actionable implementation plans to achieve these targets. The KCS will apply the same rigorous and inclusive approach to this process (will involve relevant stakeholders in the development of detailed implementation plans).			District sets up a stakeholder engagement process to flesh out the implementation plan in more detail and shares process with broader district community.		Implementation plan finalized through stakeholder engagement process (with greater level of detail for 2014-15 and lower level of detail for the years beyond 2014-15), and incorporated into the final strategic finance plan.	Implementation of activities outlined in the plan begins.
Milestone 2-d							

APPENDIX A: OUTCOMES AND MILESTONES CHART

Finalize a Personalized Learning strategy for the district, with cost implications included, both for the 2014-15 budget and for the five-year strategic finance plan.

The KCS has done some high level benchmarking of personalized learning best practices and costs, and is moving ahead with an 11-school pilot, but needs more information to develop a district-wide adoption plan.

(1) The 2014-15 budget proposed to the Board of Education includes initial investments targeted at deploying a personalized learning strategy more broadly across the district.
(2) The longer roadmap in the draft finance plan is updated, as needed, based on additional stakeholder input.

(1) The 2014-15 budget submitted to and approved by the County Commission includes initial investments targeted at deploying a personalized learning strategy more broadly across the district.

(2) The finalized strategic finance plan lays out the finalized roadmap for the KCS to move toward a vision of personalized learning for all students over five years.

d	Implementation of personalized learning strategy begins.
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(Anticipated) External Challenges or Factors
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Over the course of the project, it will be important to make the time not only to conduct the analysis, create a solid factbase, understand the implications, and develop action plans, but also to create a genuine dialog around the initial findings and recommendations. The analyses may well lead to recommendations that are not universally accepted by stakeholders. The KCS will work closely with its partners, Parthenon and ERS, to develop a factbase of critical information on each major resource allocation topic. The goal will be to create a common understanding of the facts among stakeholders, and to have all discussions be informed and driven by data, to the extent possible. Getting to this level of stakeholder engagement will be necessary to get to an actionable 5-year plan.

	Baseline	Actual Progress or Completion	Actual Progress or Completion	Anticipated Progress or Completion	Actual Progress or Completion	Anticipated Progress or Completion	
		Period 1	Period 2	Period 3	Period 3	Period 4	Period 5
OUTCOME 3							
The KCS leadership will be a) willing to continue the resource alignment work, b) understand what needs to be done annually as part of the work, c) will have begun to develop/acquire skillsets necessary to do the work on an ongoing basis, and 2) will have a plan to fill in remaining capacity gaps.	The KCS leadership is already quite committed to the work, as illustrated by the execution against the 2009 strategic plan, the aggressive cost management practices, by investment of time and resources into the ROI study, and by follow-through on key recommendations of this study. A preliminary assessment of KCS' capacity to execute this work on its own is provided in Criterion 5 of the proposal.			The KCS leadership begins to address identified capacity gaps through either process, additional staff, or additional training solutions.		The KCS leadership continues to address identified capacity gaps through either process, additional staff, or additional training solutions.	The KCS now has a revamped planning and budgetary process it can begin implementing in the fall of 2014.
Milestone 3-a							
Complete organizational review of key functions	The KCS has a lean central office and has some initial ideas about where skill gaps might reside, but this has not been synthesized / looked at in the aggregate.			Modifications made to capacity building plan, as needed.		Modifications made to capacity building plan, as needed.	Modifications made to capacity building plan, as needed.
Milestone 3-b							
Make changes to current planning and budgetary processes.	The KCS has a budget development and adoption process, but the various evaluation and continuous			Immediate changes to processes that had been agreed upon with the district are acted upon		Immediate changes to processes that had been agreed upon with the district are acted upon	More comprehensive changes to processes begin with the 2014-15 school year.
Milestone 3-c							
Create a simple tool for the KCS to measure their progress in building capacity.	This does not exist today.			Pulse survey repeated toward end of quarter. Survey results used to brainstorm potential modifications to capacity building plan or processes.		Pulse survey repeated toward end of quarter. Survey results used to brainstorm potential modifications to capacity building plan or processes.	Pulse survey repeated toward end of quarter. Survey results used to brainstorm potential modifications to capacity building plan or processes.
Milestone 3-d							
Identify resources for additional staff (if needed).	The KCS has a very lean central office; we may find over the course of the project, that the KCS needs to augment central office staff with a few more staff, with specific skillsets.						
Milestone 3-e							

APPENDIX A: OUTCOMES AND MILESTONES CHART

Hire additional staff (if needed).	The KCS has a very lean central office; we may find over the course of the project, that the KCS needs to augment central office staff with a few more staff, with specific skillsets.			(1) Immediate hires made (assuming funding sources have been identified and are available in the immediate term). (2) Internal reallocation of responsibilities begins, if applicable.		(1) Internal reallocation of responsibilities, if applicable, completed. (2) Job descriptions for remaining additional staff finalized.	(1) Remaining new positions filled. (2) New staff trained on relevant tools/analyses/ processes as part of an onboarding process.
Milestone 3-f							
Educate the KCS leadership on resource allocations tools/ analyses.	The KCS is not yet familiar with the tools/analyses that Parthenon and ERS will utilize during this project.			Additional training (on tools and methodologies) provided to designated (existing) KCS staff as needed as well as to any new hires (if applicable)		Additional training (on tools and methodologies) provided to designated (existing) KCS staff as needed as well as to any new hires (if applicable)	Additional training (on tools and methodologies) provided to designated (existing) KCS staff as needed as well as to any new hires (if applicable)
(Anticipated) External Challenges or Factors Implementation Risk. The KCS together with Parthenon will design an improved process, but implementation of this process will depend on the district's ability to protect this as a priority and to guard against other priorities or "fire drills" displacing this on the priority list. The KCS will attempt to overcome this by assigning primary responsibility for the overarching continuous improvement process to a specific functional area which will act as the "owner" or "coordinator." Which group / individuals will drive the process(es) going forward will be determined as part of the project. Once the roles of senior district leadership in this process are better defined, they too will become part of an accountability system (i.e., become part of "management objectives" against which performance is evaluated annually).							

APPENDIX A: OUTCOMES AND MILESTONES CHART

Instructions for documenting progress towards outcomes:

- 1) Complete the yellow cells with your Actual Progress or Completion for this reporting period. Include one to two points on your progress for each outcome and each milestone.
- 2) If your Anticipated Progress or Completion has changed for future periods, please update it on the chart below (columns F through I).
- 3) To see past Anticipated Progress or Completion for a reporting period, click on the + sign at the top of the page.
- 4) If changed, please update the "(Anticipated) External Challenges or Factors" section at the bottom of the chart.

NOTE: This spreadsheet is designed to populate with data from either the "Proposed Outcomes & Milestones" tab or from the last completed "Period X Report" tab. Formulas are included in all cells except the yellow cells. If you need to overwrite your Anticipated Progress or Completion for future periods or your External Challenges or Factors, click on the cell once and type in your

	Baseline	Actual Progress or Completion	Actual Progress or Completion	Actual Progress or Completion	Anticipated Progress or Completion	Actual Progress or Completion	Anticipated Progress or Completion
		Period 1	Period 2	Period 3	Period 4	Period 4	Period 5
OUTCOME 1							
Knox County Schools adopts a 2014-15 budget that reflects significant steps to align resources needed to implement the instructional strategies desired by the KCS leadership.	The 2014-15 budget development cycle has not yet begun. Steps to identify resource alignment opportunities to maximize funding for highest impact areas have not yet been taken.				Final 2014-15 budget (approved by both the Board and then by the County Commission) reflects significant steps to align resources needed to implement district's instructional priorities.		The work of implementing resource alignment opportunities agreed to in the 2014-15 budget begins.
Milestone 1-a							
Finalize programmatic areas for further investigation and hypothesis testing.	The KCS leadership team held a number of brainstorming sessions in April 2013 and arrived at a number of initial areas and hypotheses for investigation, laid out in the proposal itself.						
Milestone 1-b							
Complete all data collection and clean-up in order to begin detailed financial and resource allocation analysis.	Full data request has been shared with the district.				The process of tagging financial and HR data (if applicable) is completed.		
Milestone 1-c							
Prioritize specific areas as resource alignment opportunities.	The KCS leadership team hypothesizes that the degree of alignment between district priorities and resource alignment is relatively strong, but needs to test this through ERS's Strategic Resource Map.				A substantial portion of resource alignment opportunities prioritized for 2014-15 are captured in the final budget that is approved for KCS.		Work on implementing agreed upon resource alignment opportunities begins.
Milestone 1-d							
Complete a Time Audit of key instructional positions.	The KCS does not have enough information today to determine how key instructional positions spend their time.						
Milestone 1-e							

APPENDIX A: OUTCOMES AND MILESTONES CHART							BILL & MELINDA GATES foundation
Complete student performance analysis (by school and for selected programs) and eROI analysis.	The KCS has conducted some of this analysis already for the recent ROI analysis (Appendix F), but at a higher level and is now looking for more detail.						
Milestone 1-f							
Develop and execute Stakeholder Engagement Plan.	The KCS leadership team has the benefit of prior planning processes on which it can draw (2008 CORRE report and 2009 Strategic Planning Process described in detail in the proposal). Stakeholder engagement in the resource allocation work would follow a similar pattern.				(1) Budget approved by the Board and submitted to County Mayor. (2) County-wide budget recommendations made by the County Commission and public budget hearings. (3) Any proposed revisions to KCS budget shared with the KCS. (4) Final KCS budget approved by the County Commission as part of the county-wide budget and capital plan. (5) Next round of stakeholder engagement meetings initiated to develop detailed implementation plan to accompany new Strategic Plan.		Updates shared with stakeholders on a regular basis, via most appropriate communication vehicles.
Milestone 1-g							
Finalize a Personalized Learning strategy for the district, with cost implications included, both for the 2014-15 budget and for the five-year strategic finance plan.	The KCS has done some high level benchmarking of personalized learning best practices and costs, and is				The 2014-15 budget submitted to and approved by the County Commission includes initial investments targeted at deploying		Implementation of personalized learning strategy begins.
(Anticipated) External Challenges or Factors							
The bandwidth of the KCS staff, especially senior leadership, to devote time to both the analysis work (discussion of analyses, action planning) and simultaneous stakeholder engagement. The KCS will overcome the issue of resource mapping and analytical bandwidth through outside partners (Parthenon and ERS). And on the stakeholder engagement side, KCS has created a temporary position (Director of Strategic Planning) and has already filled this position with an Ed.L.D. resident who will be dedicated full-time to coordinating the strategic planning effort on behalf of the district. In May-July 2013, the KCS senior leadership team will come together, as they did for the 2008 CORRE report and for the 2009 strategic plan, to create an intentional mapping of internal district facilitators against stakeholder meetings and focus groups. The KCS will also turn to strong external partners (Great Schools Partnership and the Knoxville Chamber) for help with facilitating meetings, especially meetings with the business community, to augment the capacity of the district.							

APPENDIX A: OUTCOMES AND MILESTONES CHART							
		Actual Progress or Completion			Anticipated Progress or Completion	Actual Progress or Completion	Anticipated Progress or Completion
Baseline		Period 1	Period 2	Period 3	Period 4	Period 4	Period 5
OUTCOME 2							
Knox County Schools develops a 3- to 5-year strategic finance plan that incorporates the district's programmatic priorities, the cost of implementing these priorities, and has a clear implementation plan to achieve these priorities within a 5-year timeframe (including key activities and activity owners).	The KCS does not currently have a strategic finance plan to support its strategic plan. This outcome coincides well with the fact that the KCS will be refreshing its Strategic Plan this year. The Strategic Plan will drive the 5-year Finance Plan.				Finalized Strategic Finance Plan, with more detailed implementation plan (developed with stakeholder input) for Year 1 (2014-15) and key milestones for the years beyond 2014-15.		Work on implementing agreed upon resource alignment opportunities in the f-year Strategic Finance Plan begins.
Milestone 2-a							
Agree on how resource alignment opportunities will be phased in over the five-year period.	While the KCS leadership has discussed resource alignment opportunities at a high level, the analysis has not yet been conducted to determine whether these opportunities are real. Once the analysis is done, the KCS leadership will have these discussions.				(1) A substantial portion of resource alignment opportunities prioritized for 2014-15 are captured in the final budget that is approved for KCS. (2) The 3-5 year finance plan is finalized and reflects any additional changes in approach/phasing that occurred between March and June 2014.		Work on implementing agreed upon resource alignment opportunities begins.
Milestone 2-b							
Develop detailed cost implications of recommended changes (e.g., for areas where additional investments may need to be made).	While the KCS leadership has discussed resource alignment opportunities at a high level, the analysis has not yet been conducted to determine whether these opportunities are real. Once the analysis is done, Parthenon will assist the KCS leadership in developing the cost implications of moving ahead with various changes.				Cost implications updated as appropriate (if adjusting approach/scale/phasing post feedback from stakeholders). Decisions incorporated into the final 5-year finance plan.		Work on implementing agreed upon resource alignment opportunities begins (district begins to redeploy funding from some initiatives to others).
Milestone 2-c							
Develop detailed implementation plan for 2014-14 school year and higher level milestones for years beyond 2014-15.	The KCS has a strong record of setting performance targets and developing actionable implementation plans to achieve these targets. The KCS will apply the same rigorous and inclusive approach to this process (will involve relevant stakeholders in the development of detailed implementation plans).				Implementation plan finalized through stakeholder engagement process (with greater level of detail for 2014-15 and lower level of detail for the years beyond 2014-15), and incorporated into the final strategic finance plan.		Implementation of activities outlined in the plan begins.
Milestone 2-d							

APPENDIX A: OUTCOMES AND MILESTONES CHART							BILL & MELINDA GATES foundation
Finalize a Personalized Learning strategy for the district, with cost implications included, both for the 2014-15 budget and for the five-year strategic finance plan.	The KCS has done some high level benchmarking of personalized learning best practices and costs, and is moving ahead with an 11-school pilot, but needs more information to develop a district-wide adoption plan.				(1) The 2014-15 budget submitted to and approved by the County Commission includes initial investments targeted at deploying a personalized learning strategy more broadly across the district. (2) The finalized strategic finance plan lays out the finalized roadmap for the KCS to move toward a vision of personalized learning for all students over five years.		Implementation of personalized learning strategy begins.
(Anticipated) External Challenges or Factors							
Over the course of the project, it will be important to make the time not only to conduct the analysis, create a solid factbase, understand the implications, and develop action plans, but also to create a genuine dialog around the initial findings and recommendations. The analyses may well lead to recommendations that are not universally accepted by stakeholders. The KCS will work closely with its partners, Parthenon and ERS, to develop a factbase of critical information on each major resource allocation topic. The goal will be to create a common understanding of the facts among stakeholders, and to have all discussions be informed and driven by data, to the extent possible. Getting to this level of stakeholder engagement will be necessary to get to an actionable 5-year plan.							

APPENDIX A: OUTCOMES AND MILESTONES CHART							
		Actual Progress or Completion			Anticipated Progress or Completion	Actual Progress or Completion	Anticipated Progress or Completion
Baseline		Period 1	Period 2	Period 3	Period 4	Period 4	Period 5
OUTCOME 3							
The KCS leadership will be a) willing to continue the resource alignment work, b) understand what needs to be done annually as part of the work, c) will have begun to develop/acquire skillsets necessary to do the work on an ongoing basis, and 2) will have a plan to fill in remaining capacity gaps.	The KCS leadership is already quite committed to the work, as illustrated by the execution against the 2009 strategic plan, the aggressive cost management practices, by investment of time and resources into the ROI study, and by follow-through on key recommendations of this study. A preliminary assessment of KCS' capacity to execute this work on its own is provided in Criterion 5 of the proposal.				The KCS leadership continues to address identified capacity gaps through either process, additional staff, or additional training solutions.		The KCS now has a revamped planning and budgetary process it can begin implementing in the fall of 2014.
Milestone 3-a							
Complete organizational review of key functions	The KCS has a lean central office and has some initial ideas about where skill gaps might reside, but this has not been synthesized / looked at in the aggregate.				Modifications made to capacity building plan, as needed.		Modifications made to capacity building plan, as needed.
Milestone 3-b							
Make changes to current planning and budgetary processes.	The KCS has a budget development and adoption process, but the various evaluation and continuous improvement processes occurring in different pockets in the district do not necessarily connect well with the budgetary process.				Immediate changes to processes that had been agreed upon with the district are acted upon		More comprehensive changes to processes begin with the 2014-15 school year.
Milestone 3-c							
Create a simple tool for the KCS to measure their progress in building capacity.	This does not exist today.				Pulse survey repeated toward end of quarter. Survey results used to brainstorm potential modifications to capacity building plan or processes.		Pulse survey repeated toward end of quarter. Survey results used to brainstorm potential modifications to capacity building plan or processes.
Milestone 3-d							
Identify resources for additional staff (if needed).	The KCS has a very lean central office; we may find over the course of the project, that the KCS needs to augment central office staff with a few more staff, with specific skillsets.						
Milestone 3-e							

APPENDIX A: OUTCOMES AND MILESTONES CHART							BILL & MELINDA GATES foundation
Hire additional staff (if needed).	The KCS has a very lean central office; we may find over the course of the project, that the KCS needs to augment central office staff with a few more staff, with specific skillsets.				(1) Internal reallocation of responsibilities, if applicable, completed. (2) Job descriptions for remaining additional staff finalized.		(1) Remaining new positions filled. (2) New staff trained on relevant tools/analyses/ processes as part of an onboarding process.
Milestone 3-f							
Educate the KCS leadership on resource allocations tools/ analyses.	The KCS is not yet familiar with the tools/analyses that Parthenon and ERS will utilize during this project.				Additional training (on tools and methodologies) provided to designated (existing) KCS staff as needed as well as to any new hires (if applicable)		Additional training (on tools and methodologies) provided to designated (existing) KCS staff as needed as well as to any new hires (if applicable)
(Anticipated) External Challenges or Factors							
Implementation Risk. The KCS together with Parthenon will design an improved process, but implementation of this process will depend on the district's ability to protect this as a priority and to guard against other priorities or "fire drills" displacing this on the priority list. The KCS will attempt to overcome this by assigning primary responsibility for the overarching continuous improvement process to a specific functional area which will act as the "owner" or "coordinator." Which group / individuals will drive the process(es) going forward will be determined as part of the project. Once the roles of senior district leadership in this process are better defined, they too will be become part of an accountability system (i.e., become part of "management objectives" against which performance is evaluated annually).							

Instructions for documenting progress towards outcomes:

- 1) Complete the yellow cells with your Actual Progress or Completion for this reporting period. Include one to two points on your progress for each outcome and each milestone.
- 2) To see past Anticipated Progress or Completion for a reporting period, click on the + sign at the top of the page.
- 3) If changed, please update the "(Anticipated) External Challenges or Factors" section at the bottom of the chart.

- Instructions for documenting progress towards outcomes:
- 1) Complete the yellow cells with your Actual Progress or Completion for this reporting period. Include one to two points on your progress for each outcome and each milestone.
 - 2) To see past Anticipated Progress or Completion for a reporting period, click on the + sign at the top of the page.
 - 3) If changed, please update the "(Anticipated) External Challenges or Factors" section at the bottom of the chart.

	Baseline	Actual Progress or Completion	Actual Progress or Completion	Actual Progress or Completion	Actual Progress or Completion	Anticipated Progress or Completion	Actual Progress or Completion
		Period 1	Period 2	Period 3	Period 4	Period 5	Period 5
OUTCOME 1							
Knox County Schools adopts a 2014-15 budget that reflects significant steps to align resources needed to implement the instructional strategies desired by the KCS leadership.	The 2014-15 budget development cycle has not yet begun. Steps to identify resource alignment opportunities to maximize funding for highest impact areas have not yet been taken.					The work of implementing resource alignment opportunities agreed to in the 2014-15 budget begins.	
Milestone 1-a							
Finalize programmatic areas for further investigation and hypothesis testing.	The KCS leadership team held a number of brainstorming sessions in April 2013 and arrived at a number of initial areas and hypotheses for investigation, laid out in the proposal itself.						
Milestone 1-b							
Complete all data collection and clean-up in order to begin detailed financial and resource allocation analysis.	Full data request has been shared with the district.						
Milestone 1-c							
Prioritize specific areas as resource alignment opportunities.	The KCS leadership team hypothesizes that the degree of alignment between district priorities and resource alignment is relatively strong, but needs to test this through ERS's Strategic Resource Map.					Work on implementing agreed upon resource alignment opportunities begins.	
Milestone 1-d							
Complete a Time Audit of key instructional positions.	The KCS does not have enough information today to determine how key instructional positions spend their time.						
Milestone 1-e							
Complete student performance analysis (by school and for selected programs) and eROI analysis.	The KCS has conducted some of this analysis already for the recent ROI analysis (Appendix F), but at a higher level and is now looking for more detail.						
Milestone 1-f							

APPENDIX A: OUTCOMES AND MILESTONES CHART							BILL & MELINDA GATES Foundation
Develop and execute Stakeholder Engagement Plan.	The KCS leadership team has the benefit of prior planning processes on which it can draw (2008 CORRE report and 2009 Strategic Planning Process described in detail in the proposal). Stakeholder engagement in the resource allocation work would follow a similar pattern.					Updates shared with stakeholders on a regular basis, via most appropriate communication vehicles.	
Milestone 1-g							
Finalize a Personalized Learning strategy for the district, with cost implications included, both for the 2014-15 budget and for the five-year strategic finance plan.	The KCS has done some high level benchmarking of personalized learning best practices and costs, and is moving ahead with an 11-					Implementation of personalized learning strategy begins.	
(Anticipated) External Challenges or Factors							
The bandwidth of the KCS staff, especially senior leadership, to devote time to both the analysis work (discussion of analyses, action planning) and simultaneous stakeholder engagement. The KCS will overcome the issue of resource mapping and analytical bandwidth through outside partners (Parthenon and ERS). And on the stakeholder engagement side, KCS has created a temporary position (Director of Strategic Planning) and has already filled this position with an Ed.L.D. resident who will be dedicated full-time to coordinating the strategic planning effort on behalf of the district. In May-July 2013, the KCS senior leadership team will come together, as they did for the 2008 CORRE report and for the 2009 strategic plan, to create an intentional mapping of internal district facilitators against stakeholder meetings and focus groups. The KCS will also turn to strong external partners (Great Schools Partnership and the Knoxville Chamber) for help with facilitating meetings, especially meetings with the business community, to augment the capacity of the district.							

Over the course of the project, it will be important to make the time not only to conduct the analysis, create a solid factbase, understand the implications, and develop action plans, but also to create a genuine dialog around the initial findings and recommendations. The analyses may well lead to recommendations that are not universally accepted by stakeholders. The KCS will work closely with its partners, Parthenon and ERS, to develop a factbase of critical information on each major resource allocation topic. The goal will be to create a common understanding of the facts among stakeholders, and to have all discussions be informed and driven by data, to the extent possible. Getting to this level of stakeholder engagement will be necessary to get to an actionable 5-year plan.

	Baseline	Actual Progress or Completion	Actual Progress or Completion	Actual Progress or Completion	Actual Progress or Completion	Anticipated Progress or Completion	Actual Progress or Completion
		Period 1	Period 2	Period 3	Period 4	Period 5	Period 5
OUTCOME 3							
The KCS leadership will be a) willing to continue the resource alignment work, b) understand what needs to be done annually as part of the work, c) will have begun to develop/acquire skillsets necessary to do the work on an ongoing basis, and 2) will have a plan to fill in remaining capacity gaps.	The KCS leadership is already quite committed to the work, as illustrated by the execution against the 2009 strategic plan, the aggressive cost management practices, by investment of time and resources into the ROI study, and by follow-through on key recommendations of this study. A preliminary assessment of KCS' capacity to execute this work on its own is provided in Criterion 5 of the proposal.					The KCS now has a revamped planning and budgetary process it can begin implementing in the fall of 2014.	
Milestone 3-a							
Complete organizational review of key functions	The KCS has a lean central office and has some initial ideas about where skill gaps might reside, but this has not been synthesized / looked at in the aggregate.					Modifications made to capacity building plan, as needed.	
Milestone 3-b							
Make changes to current planning and budgetary processes.	The KCS has a budget development and adoption process, but the various evaluation and continuous improvement processes occurring in different pockets in the district do not necessarily connect well with the budgetary process.					More comprehensive changes to processes begin with the 2014-15 school year.	
Milestone 3-c							
Create a simple tool for the KCS to measure their progress in building capacity.	This does not exist today.					Pulse survey repeated toward end of quarter. Survey results used to brainstorm potential modifications to capacity building plan or processes.	
Milestone 3-d							
Identify resources for additional staff (if needed).	The KCS has a very lean central office; we may find over the course of the project, that the KCS needs to augment central office staff with a few more staff, with specific skillsets.						
Milestone 3-e							

APPENDIX A: OUTCOMES AND MILESTONES CHART							
Hire additional staff (if needed).	The KCS has a very lean central office; we may find over the course of the project, that the KCS needs to augment central office staff with a few more staff, with specific skillsets.					(1) Remaining new positions filled. (2) New staff trained on relevant tools/analyses/ processes as part of an onboarding process.	
Milestone 3-f							
Educate the KCS leadership on resource allocations tools/ analyses.	The KCS is not yet familiar with the tools/analyses that Parthenon and ERS will utilize during this project.					Additional training (on tools and methodologies) provided to designated (existing) KCS staff as needed as well as to any new hires (if applicable)	
(Anticipated) External Challenges or Factors							
Implementation Risk. The KCS together with Parthenon will design an improved process, but implementation of this process will depend on the district's ability to protect this as a priority and to guard against other priorities or "fire drills" displacing this on the priority list. The KCS will attempt to overcome this by assigning primary responsibility for the overarching continuous improvement process to a specific functional area which will act as the "owner" or "coordinator." Which group / individuals will drive the process(es) going forward will be determined as part of the project. Once the roles of senior district leadership in this process are better defined, they too will become part of an accountability system (i.e., become part of "management objectives" against which performance is evaluated annually).							

