

He Kaponga Arotake: Evaluation of the Balanced Scorecard approaches by Springboard Trust

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He whakarāpopoto | Executive summary

Springboard Trust has been supporting school leaders in Aotearoa New Zealand with the 10-month Strategic Leadership for Principals Programme (SLPP) to develop their effective strategic planning capability.

In 2022, Springboard Trust delivered a pilot 3-month professional development programme, Balanced Scorecard for Schools Aotearoa (BSSA), for those who had completed the SLPP. This introduced the Balanced Scorecard (BSC) tool, developed initially to support businesses (Kaplan & Norton, 1992) but modified to assist principals in the challenge of measuring their school's progress, performance, and impact against their strategic plan. The BSC encourages principals to use four perspectives to set strategic goals and monitor their school's progress. These are: Academic Learning; Teaching and Leadership; School Culture and Community; People, Tools, and Resources. During the programme, school leaders develop objectives for each perspective and implement actions that seek to improve each objective, then measure these to gauge impact and progress towards their strategic vision.

Two waves of the BSSA programme were delivered in 2022, then Springboard Trust carried out a pilot evaluation including participant feedback and adjustments made, including a name change to Strategic Measurement for Schools (SM4S). Two subsequent waves of principals have engaged in the SM4S programme, continuing the core approach of developing a BSC for their school.

This report provides an independent formative evaluation of the BSC approach. It seeks to gain insight from the experiences of principals selected from across all four waves who completed a BSC during 2022–23.

The evaluation questions guiding this study were: 1. What is working well for principals in BSSA and why? 2. What could be improved? 3. Where do principals see this going next?

Eight principals and tumuaki Māori participated in semistructured interviews and shared their experiences of the BSC programme and its subsequent use, value, and impact in their own school settings. They were selected to provide a diverse range of experiences including wave of programme, school type, student roll size, and geographic region.

Overall, all principals were impressed with the quality of professional learning received and spoke of the value added to their strategic leadership practice impact by developing longer-term measures, systematic thinking, a clear vision for planning, and a broader definition of school success. A growth in collective purpose was emphasised through sharing and adapting their BSC with staff, boards of trustees, students, whānau, hapū, iwi, and their wider communities.

Interviewees appreciated the four perspectives approach; with tumuaki Māori and some tauiwi principals feeling this could be strengthened to better support equity and inclusion by aligning culturally responsive frameworks to the BSC. This was consistent with the findings of an NZCER report that gained insight into the experiences of Māori leaders and capacity partners in the SLPP. It concluded “to attract more Māori principals to the programme, consideration should be given to the increased inclusion of Māori content, language, and knowledge to enable Māori leaders to see this programme as a favoured choice for their professional learning and development” (Turner-Adams et al., 2022).

A wide range of measures were being used to determine progress on the objectives chosen and these often changed once school leaders shared their BSC with their school community.

To support development of the BSC, many principals requested a database of examples, exemplars, and video case studies to help them choose appropriate progress measures. Many interviewees, having initially used existing data to develop their baseline BSC, went on to explore new and innovative measures. The most common way of refining the choice of measures was by critiquing these with colleagues and sharing the BSC widely to gather community feedback.

Timing within programme delivery was considered an area for improvement and reflected the time-poor nature of a principal's role, particularly for teaching principals.

Building effective relationships is essential in professional development and principals requested opportunities for face-to-face sharing rather than a solely online programme. Developing whanaungatanga at the start of the programme was considered a motivator for sharing and forming an ongoing community of practice. Capacity partners who understood the context and philosophy of the school were greatly appreciated.

A range of principals voiced they would prefer professional development in a group with similar types or schools. Some felt they would have gained more value from discussing solutions to similar challenges, rather than modifying content not relevant to their context.

The 3-, 6-, and 12-month check ins were highly valued by those who attended. However, many consistently missed out on these opportunities due to insufficient lead in time to book these into the principals' busy schedules.

The opportunity for senior leadership teams to join principals on the BSC programme was highly successful for those in the most recent wave. A core impact of the BSC across all waves was the desire to share it with others, demonstrated by principals sharing their learning and advocating for its use to staff, other principals, and the Ministry of Education.

Looking to the future, all principals intend to keep using the BSC with some adaptations to suit specific contexts. Most wish to maintain communication with their cohort and grow their community of practice. These tended to be the same principals who advocated for the BSC programmes along with the SLPP being accessible for all principals in Aotearoa.

1. He kōrero whakataki | Introduction

He kōrero whakamāramatanga | Background

In 2023, Springboard Trust approached Rangahau Mātauranga o Aotearoa (NZCER) to provide an independent evaluative lens on the Balanced Scorecard for Schools approach that the Trust has been trialling and developing with school leaders in Aotearoa New Zealand.

The Balanced Scorecard (BSC) originated as a tool for business performance management by Kaplan and Norton (1992). Likened to “the dials and indicators in an airplane cockpit”, it involved applying a four-perspective lens, underpinned by a set of measures to provide a fast but comprehensive view of the business (Kaplan & Norton, 1992, p. 72). Over time, the BSC is said to have become a key component of structured approaches to corporate strategic management as it “provides executives with a comprehensive framework that translates a company’s strategic objectives into a coherent set of performance measures” (Kaplan & Norton, 1993, p. 4). Balanced Scorecards have been widely used in corporate and non-profit contexts, with growing popularity in higher education institutions.

The literature suggests perceived benefits, challenges, or limitations of BSC.

Perceived benefits include:

- better strategic planning
- improved strategy communication and execution
- stronger alignment across parts of the business or organisation.

Limitations or challenges include:

- it can be overwhelming
- a BSC can’t be copied precisely from an example (as it is designed to meet a specific context and its needs)
- requires strong leadership to be successful.

Other critiques question the rigour and validation of BSC. To fill the gap of providing an overview of BSC in educational contexts, De Jesus and Alves (2023) provide a content analysis of 65 articles that specifically addressed the use of the BSC methodology in education scenarios. Overall, they found only three publications with the same author (Kettunen, who focused on the BSC and stakeholder relationships), indicating great diversity but lack of depth of research on the BSC in education. The four most discussed topics in this research were: diversity of BSC in the education sector; strategic management with BSC; statistical methods for managing BSC; and strategy maps for BSC.

While we found a few isolated international studies on the use of BSC in schools, there does not seem to be a large amount of literature in this area yet. This small evaluation contributes to the existing literature, exploring the value and impact of the BSC through the eyes of principals working in diverse school contexts in Aotearoa.

Te tatauranga taurite mō ngā kura o Aotearoa | Balanced Scorecard for Schools Aotearoa

Springboard Trust's Balanced Scorecard for Schools Aotearoa (BSSA) programme was developed through an initially small trial. The programme was initially scoped with five schools in 2021. In 2022, three waves of up to 15 principals attended three evolving iterations of the programme of 3 months each. In 2023, in response to the 2022 review (responding to participants' feedback), each principal was joined by up to three teachers from their senior leadership team and the programme was lengthened to 6 months. Although the name of the programme was changed to Strategic Measurements for Schools (SM4S) to reflect a change in focus from tool to outcome, Springboard Trust describes the outputs of the two programmes as similar.

We will therefore refer to both BSSA and SM4S as "the programme", and the Balanced Scorecard for Schools tool as the "BSC". Twelve teams began the renamed programme in May 2023 and a further 19 teams formed the next wave in August 2023. A total of 48 principals and tumuaki had completed the programme over 2022–23.

The BSC has four perspectives:

- Academic Learning
- Teaching and Leadership
- School Culture and Community
- People, Tools, and Resources.

In the programme, principals engage in self-directed learning, workshops with subject experts and other senior leaders in their wave, as well as one-to-one work with a facilitator in the development of their own BSC, specific to the context of their school. At the end of the programme, principals present and share their own BSC to other principals and Springboard Trust. In addition, participants are given the opportunity to check in with each other via a facilitated reflection after 3 months, 6 months, and 12 months following the end of their programme. At each check in, participants are facilitated through a discussion of current progress, actions underway, and issues arising. These regular check ins provide opportunities to discuss measures, targets, long-term tracking, and updates of learnings from other programme groups.

Ngā akoranga | What Springboard Trust has learnt from its pilot

Springboard Trust carried out its own evaluations of the BSSA pilot (Leeson, 2021), gathering feedback from participants in surveys and discussions at various points along the BSSA process, and finding:

- All Wave 1 schools reported they were committed to the long-term use of the BSC.
- Principals felt Springboard Trust should offer the BSC programme for principals and their leadership teams directly after completing the SLPP.
- There was a slight difference in what the perceived ideal length of time would be for a BSC programme (from 3 months to 1 year).
- All schools were adamant the ideal structure for the programme was face-to-face.
- All schools felt having principals and their leadership teams attending together would create an effective learning and support environment.

A group convened by Springboard Trust carried out a preliminary analysis of themes across 35 draft BSC produced by principals. All scorecards reviewed included the following features: school vision;

four BSC perspectives; four objective statements (one for each perspective); baseline scores showing current performance against each objective; and a visual device to show progress.

The reviewers noted with interest how “frank” some principals had been in giving themselves low baseline scores in some areas, and wondered how this impacted their comfort in widely sharing this with school and community stakeholders as a tool for strategic action.

Te huarahi arotake | Scope of evaluation

This independent evaluation engaged a small but broad group of principals from diverse school contexts who participated in one of the first four waves of the BSSA or SM4S professional development programmes and had already completed their BSC.

During early conversations between Springboard Trust and BSSA, the key facilitator of the BSSA pilot suggested “we don’t know the value of what we’ve created yet”. There is interest in “the longer game” impacts, as well as “unexpected consequences” and “surprises or side effects”. Springboard Trust indicated their interest in the potential to “build a database of measures” that could be “offered not prescribed” to principals to support use of a BSC for their own contexts. Springboard Trust is interested in “the power of the network” for devising measures that will work for different schools. These initial conversations led to the co-design of a developmental evaluation by Springboard Trust and NZCER to help inform further support for senior leaders in schools creating and implementing a BSC. Principal participants were specifically asked about the measures they chose when scoring their school on the four perspectives of their BSC and their willingness to share these with others.

Developmental evaluations by nature are rapid and iterative. Given the paucity of research on BSC in schools and particularly in the Aotearoa New Zealand context, we used an early evaluation approach focusing on the insights and experiences of principal participants from the three 2022 waves and first 2023 wave. Each of the 2022 programmes was 3 months long but slightly different as Springboard facilitators continue to be operationally agile, adapting delivery according to the feedback and needs of participants. The 2023 first wave of the programme was extended to 6 month’s duration.

Some principals we interviewed had just completed their first Balance Scorecard and were beginning to share them with their wider school community. Others had experienced the benefit of a longer post-programme period including 3- and/or 6-month check ins with Springboard and other participants. Some interviewees had up to a year of post-programme experiences in development and implementation of their BSC to call upon, including one who had changed their job and shared experiences of using the BSC approach in two different school settings.

This early snapshot of the value of the BSC tool and programme from the perspectives of users should support Springboard Trust to:

- amplify the effective components of this professional development programme
- enable ongoing support for independent implementation of the BSC in schools.

Ngā pātai arotake | Evaluation questions

The evaluation questions guiding this study were:

1. What is working well for principals in BSSA and why?
2. What could be improved?
3. Where do principals see this going next?

2. Ngā tikanga arotake | Methodology

Te kōwhiri kaiurunga | Participant selection

Discussion with Springboard Trust indicated that gaining in-depth insights was of most value, so our approach was qualitative, focusing on interviewing eight principals selected by which waves they participated in, school characteristics, and level of engagement in the programme (e.g., participation in 3-, 6-, and 12-month check ins). The principal sample was chosen to provide a range of experiences, including hearing from participants who have engaged less with post-programme activities.

We used a similar approach to the previous SLPP evaluation (Turner-Adams et al., 2022) in which Springboard Trust contacted programme participants to allow them to “opt out” of being contacted by NZCER. Contact details for those who did not opt out were then provided to NZCER so that the research team selected a range to interview. Springboard Trust was not told which principals were interviewed.

To ensure the voices of tumuaki Māori participants and those from kura or immersion/bilingual units were included, we invited a range of tumuaki Māori leading in different contexts. The Kairangahau | Researcher Māori in the team led our bilingual communications and offered interviews that could be conducted in te reo Māori or English, as preferred by each interviewee. In this evaluation, all participants chose to be interviewed and respond in English.

Each interviewee provided NZCER with access to the BSC created by that principal as an “object” that principals could speak to as we explored their experiences and perspectives on the programme.

Te hunga whakaurunga | Study participants

NZCER interviewed eight principals and tumuaki in Term 4, 2023. They were ~17% of those who attended Springboard BSC programmes in 2022–23.

These principals came from a range of experiences:

- Wave of programme: Wave 1 (n = 2), Wave 2 (n = 3), Wave 3 (n = 1) and Wave 4 (n = 2)
- School type: Kura-a-lwi (n = 1), contributing (n = 2), full primary (n = 2), full primary Catholic (n = 1), special school (n = 1) and secondary (n = 1)
- Student roll size: <100 (n = 1), 200–400 (n = 4), 400–600 (n = 2), >600 (n = 1)
- Geographic region: Auckland, Bay of Plenty, Hawke’s Bay, Tasman, and Canterbury.

Te mahi uiui | Semistructured interview

All participants were interviewed via Zoom during Term 4, October–December 2023. Each interview took between 25 and 45 minutes, and all participants agreed to be recorded. Refer to the appendix for the interview questions and prompts. The interviews were transcribed, uploaded to NVivo, and manually analysed by researchers using inductive thematic analysis (Braun & Clarke, 2006).

Ngā ngoikoretanga | Key limitations

The small sample size of eight principals in this analysis reminds us that there may be further successes and challenges experienced by participants that have yet to be revealed.

Participants were required to be available for interview during Term 4, 2023. This is a busy time for school leaders and, although no participants opted out of the opportunity to be interviewed, there were a number who had not opted out but also did not respond to initial requests or follow-up calls to be interviewed. In addition, two principals who were in the most recent wave of the programme were happy to be interviewed but had not yet completed their BSC (a selection criteria) so were not included at this time.

The views of both groups that were not able to be interviewed are valid; however, even with a 3-month window of opportunity, timing prevented participation. Therefore, it may be valuable to gain insight from programme participants on appropriate timing of future evaluations.

3. Te whai hua ki te mahere rautaki | Value added to strategic leadership

As identified in Springboard Trust's internal report *BSC for Schools Pilot: Evaluation of Wave 1 Schools* (Leeson, 2021), principals are using the BSC as part of a strategic management system. Principals expressed the value that the BSC programme added through themes of impact on their strategic leadership, collective purpose, and planning.

In 2023, when asked how does using the Balanced Scorecard add value to their strategic leadership practice, almost all principals emphasised the value of long-term measures in enhancing strategic leadership and the systematic thinking that goes into the process. The BSC was described by most principals in this evaluation as the 10-year long-term view that was previously missing, and now sits alongside their school vision and 3-year strategic plan.

I guess I've never thought about longer term goals. I always thought about strategic planning, for three years or whatever was the long term ... but this got me thinking longer term, bigger picture, 10 years or more and I think that's a very sensible idea. (Principal E)

What the balanced scorecard does is it helps keep you in a strategic space, being intentional about progress in success and working towards that. I think what I've learned from developing our own BSC and being part of this journey is I've learned about having a broad definition, but a simple and clear one, of what success looks like for a kura. I've also learned a structure and a process for how to document and define that success and then measure current state and work towards progress over the long time. (Principal A)

Te whai take | Collective purpose

There were many aspects of a collective vision that arose through developing and sharing a BSC. Some principals spoke of the clarity that came through when constructing the BSC with their senior leadership team and board of trustees. Others described the value of sharing the BSC with the wider school community, whānau, hapū, and iwi to develop and enable a collective purpose.

We had to share our scorecard with the staff and the board. Previously they had just been discussions with me and the Deputy Principals but once it became official when it was written down and we started talking with more people, we got more ideas and it got momentum. It changed to be more collaborative and transparent. (Principal E)

I have had people ask me for my charter and to see how we have done our charter. I was quite happy with it then [before BSC], but I am not happy with it now because I can see there are areas that we need to work on. We have been gathering data from our Tamariki, whānau, teachers, and our community, our kaumātua, and our Board. (Principal G)

For some principals, value was added by sharing their strategic thinking in a new way; for others, it reinforced their holistic approach to decision making.

I think it's just reinforced that collective vision. You know the importance of everyone having clarity on why we're here. What's our purpose? Because sometimes it sits in my head and I'm thinking that everyone understands it. (Principal C)

It was of interest that both early career and experienced principals found the BSC supported their strategic leadership to enhance collective purpose.

I'm a first-time principal so I really found huge value, this was an amazing opportunity to bring my senior leadership team into the journey as well, and to have them as part of the PLD ... It has brought real cohesion to our leadership team [and] allowed us to really get on the same page. (Principal D)

I guess we as principals always think long term, but you don't always have a written plan about it. It's sort of up here and something we might talk about sometimes, but getting it on paper and getting everyone in agreement about these really, really, long-term goals was quite powerful and meaningful, and it means everyone on staff knows how important it is. (Principal E)

Te whakariterite | Planning

Principals described how the BSC helped their planning processes by providing a clear and broad longer-term direction to revisit regularly that was adaptable and achievable.

It made it sound clearer for our planning processes in that we're ahead of the game. Normally the strategic plan for next year, we're developing [in November]. Whereas it was really a simple process this year because we had that forward thinking around our strategic vision and purpose. (Principal C)

Every fortnight we have a short meeting, a strategic meeting where we look at our strategic goals, our two- or three-year strategic goals as well as our BSSA stuff. We try to keep it front of mind that means when things that come up in between times, it's not in the distant memory, it's still always on the edge of our conscious thinking. (Principal G)

We can focus on the whole picture of what we're doing at school. I think with a broad lens it means that it's more achievable. There's more flexibility. But the focus always comes back to, what we can do to support our learners the best. (Principal H)

4. Ngā tauritenga e whā | The four BSSA perspectives

Ngā painga | What is working well?

He ngawari | Relevant, broad, and simple

Six principals considered the four BSSA perspectives relevant, broad, and simple, with half stating nothing was missing. One recognised that the extra dimension of being a Catholic school was easily brought into the four perspectives and another specifically commented positively on the recognition that student achievement is not the only bottom line.

I believe that academic learning [perspective] is about children's progress in their experiences. The teaching and leadership [perspective] is about those of us that work in the school, and the support staff. Then we've got the other two [perspectives] which bring in the community and outside agencies that can support [the first two]. If you're looking at it from a wellbeing lens ... academic lens ... an environmental lens, any of those lenses all fit beautifully into one or other of those. (Principal H)

I think they're excellent ... in a business model, profits are not the only bottom line and likewise in an education setting—student achievements are not the only bottom line. It is about ... all those 4 pieces going together and making sure that you know you have a successful kura that is delivering good outcomes for students over the longer term. (Principal A)

One tumuaki Māori appreciated the concept and philosophy of the four BSC perspectives but modified them by aligning to a Māori health and education framework with te ao Māori values.

Eventually as we have got our head around them, they are 4 really good pou to hang our work on ... If you think about Te Whare Tapa Whā which we do, I guess you have academic learning as hinengaro, school culture can sit under wairua, that pou of wellbeing, and at a push you could say collaboration is your whānau. I think when you talk about people and resources you talk about pūtea and you don't talk about collaboration as much. Interestingly, we brought collaboration in under teaching and learning because that is one of our strategic aims. (Principal D)

He whai hononga | Overlap reiterates interconnection

Although the BSC perspectives overlapped, interviewees recognised the opportunities this created for discussion on where to place measures, and how the interconnected perspectives support each other.

Actually, it was quite tricky because there were some overlaps. But then, what it does is it helps you to be really focused on which perspective can support something best, and that really helped. There will always be lines that blur ... you also know that each one is supporting the other. (Principal H)

Te hono ki ētehi atu anga | Aligns with other frameworks

Most interviewees stated the four BSC perspectives align well with existing frameworks in schools, particularly the 3-year strategic plan and annual plans. They also expressed how well the BSC followed on from the thinking they developed during the SLPP.

The strategic plan that we came up with [was] through the Strategic Leadership for Principals Programme through Springboard. But what [BSSA] does, which I haven't had before, is to bring in a longer-term view and measurement of how we're going as a school over a 5- to 10-year period as opposed to how we're going this year ... Taking what was our previous strategic plan and annual planning, working alongside those and taking it to the next level. (Principal B)

Other frameworks that were described as aligning well to the BSC or having the potential to strengthen the BSC were schools' own community consultation processes, and culturally responsive models: Te Whare Tapa Whā (Durie, 1994), *Wayfinding Leadership* (Spiller, 2015), *Leading to the North-East* (Bishop, 2023), *Teaching to the North-East* (Bishop, 2019), and *Universal Design for Learning* (Rose, 2000).

If you think about something like Te Whare Tapa Whā, it is holistic. [The four walls] literally all rely on each other. But you take one down, the roof will fall. I think that would be really good to think along those lines and doing some work around that. Add a bit more of a culturally responsive model. (Principal D)

We can look a bit wider to the horizon, and we can use this tool to help inform that ... Our board will be involved, our senior leadership team and our community ... I think the impact of that will be to enable us to have clear alignment ... As we know the winds of change are always blowing, and whether it's a change of government, or a new curriculum, or a pandemic or new research. Again, it enables us to come back to know what we're doing and evaluate against it. It gives us in *Wayfinding Leadership*, that model in terms of knowing what we've got. I have that touch back of where we're going and we're reading the waves and the wind. (Principal A)

He aha ngā āhuatanga whakapakari ake? | What could be improved?

Te whakakī whāwhārua | Overlap creates gaps

Due to perspectives overlapping, a few schools had difficulty placing fundamental objectives, which may best be viewed from two perspectives.

I guess there's crossover between 'learning and teaching', and 'leadership'. We had a bit of discussion around those two areas. One of our objectives was around our curriculum and whether we place that in the learning or the teaching and leadership perspective. (Principal B)

Some we really struggle with the crossover between. What could have fitted into one initiative could have fitted into multiple areas of the balanced scorecard. So, for example, whānau connections or community connections. That could have been a people, resources, tools, or it could be a connection with community stakeholders. (Principal C)

5. Te Mana Taurite | Equity and Inclusion

Ngā painga | What is working well?

Some principals described how equity and inclusion are addressed through one of the four BSC perspectives or across all perspectives.

In terms of the BSC under the teaching and leadership space, we have committed as a school to using Russell Bishop's *Teaching to the North-East*. The Effective Teacher Profile is our pedagogical framework ... How we create a family-like context within our classrooms then engage in ways that make a difference for students. Part of that is about connecting with ākonga, connecting with whānau, looking at creating a space within the classroom that we feel their culture is valued, they feel heard and seen and we're finding ākonga are active participants in the process ... That is a stated goal within the balanced scorecard and is improving equity and inclusion within our school. (Principal A)

I have used the theories around leadership. I have seen how they overlap. Those are things I would use routinely and some of the discussions we had around vision. I have just been following up on some of that as our Māori values are some of the side branches of the BSC. (Principal G)

He aha ngā āhuatanga whakapakari? | What could be improved?

Some principals used the BSC to focus on improving equity by enhancing whānau and ākonga voice. However, many recognised that cultural equity was not specified and may be overlooked as it intersects through all four perspectives. Principals shared their concerns, and some offered the solutions they had found to address these.

Because it's very localised, and predominantly about our community and our environment, that to me has shown to be very important to our community. We struggle with separating it between Māori and non-Māori and we do what we can to our capability as far as being culturally responsive. (Principal H)

We now have a Mana Māori programme which is designed to support our Māori students through their achievement and to raise tikanga and te reo within the school generally. It is and it isn't directly related to the BSC ... when I look at the measures that we used last year, which was wellbeing, it didn't really show a big difference for our Māori students compared to our Pasifika students. Whereas we feel that there is a difference within the school, and the comments from the students are what we feel, that's why we have a separate measure. (Principal B)

Improving equity and inclusion for those under served. I think that got a little bit lost in that message because we're looking so holistic that the finer details of the groups of Māori and Pacific got missed a little bit ... We want ākonga to be high achievers which is a holistic view, but it needs to drill down on those that aren't being successful. Then my worry is that within our community surveys, we're not capturing the voices of those whānau as well. (Principal C)

One principal resolved this concern by splitting the School Culture and Community perspective into two objectives and continuing to use the BSC with an objective that explicitly addresses equity: Whānau culture within the school and Māori achieving success as Māori.

It looks like we're going to have 5 objectives, which we're now trying to put measures alongside in the same way as I did last year ... incorporating the BSC approach into our strategic planning from next year. (Principal B)

Another principal chose an objective on School Culture and Community that focused on equity of engagement and access to information.

Our focus on engaging with our parents was mainly aimed at our Māori and Pasifika parents because they are poorly represented in much of [what] we do with our families, with a couple of exceptions of events that are really popular ... The beginning of the year meeting with the teacher, we get a 95% turn out ... and when we do our performance ... but when we run workshops like transitioning your young person out to the real world, knowing how to access supports and programmes post [school] is really important ... we don't get many parents from our Māori and Pasifika families coming to those sorts of things. (Principal E)

Tumuaki Māori in English-medium requested alignment to holistic culturally responsive models already in schools, such as Te Whare Tapa Whā (Durie, 1994), *Leading to the North-East* (Bishop, 2023), *Teaching to the North-East* (Bishop, 2019) and Universal Design for Learning (Rose, 2000).

I don't think there's been enough impetus from the program to really put a Te Ao Māori lens over it, and to actually ask ourselves those tough questions about. Will this lead to equitable outcomes for your Māori learners? ... One of our goals is around collaboration. What does that mean? If we look at it through Te Whare Tapa Whā? (Principal D)

Tumuaki Māori in a Māori-medium setting recommended approaches imbedded in kaupapa Māori facilitated by Māori as most effective.

We are a kura-ā-iwi, we are here to help our iwi with their strategic goals. I don't know if they really got that. I know they work really hard to try to make it more culturally appropriate, but I don't think the business part was for us. (Principal G)

Another principal felt a directive towards improving equity for students with a range of special learning needs was missing as the perspectives and objectives set were broad and holistic for all students.

I'm in a special school for students with disabilities, and property is a big deal for us because we don't have purpose-built buildings and life is really difficult to get what our students need with what we've got ... If we haven't got the right equipment and surroundings for our learners, they can't actually access the curriculum. (Principal E)

6. Te mahi tātari | Measures used for developing BSSA

Ngā painga | What is working well?

Te mahi tohatoha | Sharing the BSC

Sharing the BSC with their own school community was helping principals and leadership teams to contextualise measures by adapting existing and developing new measures while establishing a collective purpose.

During that PLD [we] needed the Board, you actually need to do it at Board level. (Principal G)

I think that transparency and openness has made it really feel like we're all together on this. [Whereas] previously, for no particular reason, [that was] something we just talked about behind closed doors. (Principal E)

We have learner capabilities, and we have measurement rubrics for their growth and their ability to work collaboratively and creatively. [Also, their] communication and having a can-do attitude. Students are used to measuring their [own] capabilities and thinking about how that leads to improved learning. When you identify aspects of agency and what that looks like, students [can] measure their capability, and talk about it because it's something they're familiar with doing. (Principal F)

Sharing the BSC with other principals or senior leaders helped improve selection of measures by collaborating and critiquing each other's measures and hearing different ideas and ways of doing things.

We learnt the most through those conversations when we really got into examining each other's measures, being critical with each other ... We had a good conversation about how you measure a successful curriculum within the school and really challenged each other on some of these ideas. (Principal B)

I personally find measures very hard ... Sometimes you don't even know it, but you get off into a little tangent and you end up writing down a measurement that's got nothing to do with the goal ... I always just get lots of help when we're doing that. I just ask lots of people and get lots of feedback. (Principal E)

Te aro ki ngā raraunga | Using existing data

All principals found using existing data and measures that fit the frameworks and values of the school has made developing the BSC easier. For example: academic planning; student achievement data including key competencies; student and teacher voice; wellbeing surveys; attendance; staff retention; finance reports; feedback from current community consultation; and stakeholders.

One of the things we wanted to do was to not reinvent the wheel and create a whole bunch of new measures. We wanted to try to use existing measures that were within the school. Around the 'people, tools, and resources' [BSC perspective], we were thinking about: How is school being effectively resourced to meet the needs of our community? We were thinking about [our] existing school finance reports [and how] staff feedback fed into our budget setting process. (Principal A)

We definitely [chose objectives] we thought were needed the most. But then once we settled on those, we tried to find measures we already had in place or we knew it wouldn't be too onerous because the more work it is, the least likely we are to do it and to keep going. (Principal E)

Principals described looking deeper at their existing data or exploring what other sources of evidence they had or could gather to indicate change over time.

We also need to use the data and think outside of the square and look at the data in a different way. One of our goals is on environment. We want an [iwi-based] learning environment. So, if you take a picture of that place beforehand then you take a picture again, that is data. (Principal G)

We saw feedback in the survey from our staff and a survey from our whānau, our community through a Facebook survey. In terms of connection with whānau: we have some hard measures around student whānau engagement in our online app that we're going to use as a measure. Also, those anecdotal comments about how many parents we see engaging within classrooms ... Just being able to measure and plot those. (Principal C)

Some principals described the benefit of making time to focus on selecting measures.

I think that you need to be really clear what you want to achieve in the beginning. The measures need to be varied, so they need to be some quantitative and some qualitative and they also need to provide you with a lens to what would your next step be, or your next aim? (Principal H)

Setting aside time to work on the system rather than in the system. Get up in the helicopter, is the metaphor they use within Springboard. Blocking in that time to do that strategic thinking and bringing in some external expertise to help you work through that. (Principal A)

He aronga hōu | New measures

Measures used by principals varied considerably. Some created their own and others chose to use independently established self-review tools based on research evidence, such as the Wellbeing@School student and teacher surveys (NZCER) or Mitey's Wellbeing Review Tool. Table 1 provides a summary of broad measures interviewees used for developing their BSC.

TABLE 1. **Measures used by a sample of eight principal participants when developing their Balanced Scorecard for Schools in 2022–23.**

BSC perspective	Quantitative measures	Qualitative measures
Academic Learning	Student assessment data, attendance	Student confidence rated by students and teachers
Teaching and Leadership	Strategic plan, policies, staff feedback, teacher planning, staff retention data	Staff feedback, teacher planning, authentic opportunities to apply learning, pedagogies used (e.g., Universal Design for Learning, Te Kotahitanga Effective Teaching Profile), gut instinct
School Culture and Community	Wellbeing@School survey, Mitey survey, community engagement in events and coming into classrooms	Whānau voice, staff, student, and community surveys, Facebook posts, gut instinct
People, Tools, and Resources	Budgets, finance reports, use of local environment for teaching and learning, community experts, stakeholder engagement	Photos of learning environments over time, gut instinct

He aha ngā āhuatanga hei whakapakari ake? | What could be improved?

A range of improvements were suggested related to measures, particularly more support in choosing and implementing measures through examples, exemplars, one-to-one support, or more time to gather the data to score the initial BSC.

What was successful for a school, and how they engage [would be useful]. We talked often about what we do is a survey with our community. But that doesn't get all the voices. Often, we're asking: How can we engage better with whānau? But we're asking people who already engage to feed back to us. What we're looking for is those that don't. (Principal C)

Hei tauira | Examples and exemplars

Five interviewees suggested examples of BSCs and measures in similar contexts are needed, particularly upfront so they know what they are working towards.

We were given examples by other schools, [but] it would be great to see how those measures were implemented. What worked, what didn't work? (Principal D)

Examples from other schools in similar contexts. It would have been nice to see some secondary examples from [region] that correlated to our context and had similar things going on for them within the school. A bank of different examples that could be collected over time would be really useful. (Principal B)

It would have been really helpful to give some examples of how other schools have done practical on the ground solutions of how they've sought feedback from community or from individuals. Otherwise, we just default to what we've done in the past. (Principal C)

Some acknowledged Springboard Trust was beginning to build a pool of examples and offered to contribute.

Springboard Trust brought this idea to education and they're only just building up their portfolio of really good exemplars, plans and what's happened over time. I think sharing of successful practice and successful outcomes will be a wonderful support to people. (Principal F)

Te tautoko takitahi | One-to-one support

Individual principals found choosing appropriate measures difficult in general. Others had specific one-off issues such as capturing voices across the whole school community or how to measure whether buildings and grounds are fit for purpose.

I haven't talked about it a lot more with the parents ... I was a little bit reluctant about sharing too much stuff about some of the things we're not very good at ... [We need an] opportunity to talk like that without making it sound like there's a problem at the school ... One-to-one help. You just need someone with your school, an expert. Talking to you about your school's measures. (Principal E)

Measures was a hard one ... as a tumuaki, wrapping my head around qualitative as opposed to quantitative. I had the measures, the whānau voice, student achievement data. It's core business, it's why we do everything. I think we do have to keep our eye on that ball a hundred percent, otherwise, why are we doing it? If we're not making a difference, you know if our tamariki aren't growing and learning then why are we doing what we're doing? (Principal H)

7. Te whakatīnanatanga | Programme delivery

Ngā painga | What is working well?

Te kiko | Content

Overall, the principals interviewed considered the content of the BSC programme as excellent. In particular, the BSC offers a systematic process that keeps principals in a strategic space, being intentional about progress.

I particularly liked the concept of the BSC. Once I got my head around it and understood the principles behind it ... I like the idea that it becomes part of your annual measurement. You're measuring key aspects that you've identified and thinking about what next. That's the real value in it. (Principal F)

I don't want to fall into the trap of doing business as usual all the time. But when I looked last month going over the strategic plan, I was quite pleased with the things that we could say we achieved. So that was quite good, and it was good to be able to review it. (Principal H)

Te hono tahi | Check ins

The regular 3-, 6-, and 12-month check ins offered by Springboard Trust develop a community of practice and motivate principals to keep on track and be accountable. The opportunity for tumuaki Māori to work alongside other Māori principals was really appreciated.

It's a bit like having a capacity partner or some sort of accountability process ... When you're part of that community you're hearing other people's stories and you think, that's a good idea ... I was able to connect with others I didn't meet before online and I emailed one of them afterwards to say, 'I'd really love to have a kōrero with you around your journey, and some of the things you're talking about.' Those conversations as a community practice, I think it's hugely valuable. (Principal A)

We had termly meetings. There were about seven of us. All of us were Māori and that was really great. That was probably more helpful than anything else. (Principal G)

Te mahi tahi o te tīma | Team participation

In the fourth wave of the programme the opportunity for leadership teams to work together on the process was highly valued.

This was an amazing opportunity to bring my senior leadership team into the journey as well, and to have them as part of the PLD ... because we've been working together on this, and we've become really aligned. (Principal D)

Ngā kaitautoko | Capacity partners

Capacity partners¹ with experience in kaupapa Māori approaches can support tumuaki Māori in English medium.

¹ Capacity partners are volunteer mentors, matched to principals by Springboard Trust, who are often strategic leaders from other sectors.

Last year, I asked for [a capacity partner] that understood kaupapa Māori and was able to connect in that way. Not just for me personally. That's what I felt I needed, but also for us as a school. That was the journey that we are on, and in fairness, he was [a] Pākehā man, but he worked with [a kaupapa Māori project], and he really like he got it. You know, he was good. (Principal D)

He aha ngā āhuatanga whakapakari? | What could be improved?

We purposefully selected interviewees for the evaluation who had engaged in the first four waves of the programme. Therefore, in considering their responses of what could be improved, we accept that some of the improvements discussed here may have already been addressed in subsequent iterations of the programme.

Te whakawhanaungatanga | Relationships

The preference for meeting face to face, particularly early on, for relationship building, was discussed by half the participants. However, all also recognised the logistic challenges with this.

I appreciate we're all over the motu ... but if there was some way that we could come together for one session at the very beginning, [for] whakawhanaungatanga and to get to know each other. I think if you build powerful connections right at the start, you're more likely to communicate powerfully throughout, even in an online environment. (Principal D)

The best sessions that we had when I was in Springboard Trust programs were face to face ... It was the strategic planning, and it was a group of local principals sitting workshoping together, and you built a more personal relationship with the support people ... To get clear-thinking space you've got to step outside your workplace. [When] waving a Zoom meeting for these things, invariably there were distractions. (Principal F)

Grouping school types together was recommended by a few principals after they had the experience of being the only school of their type in a wave and would prefer to have worked with 'schools like us'.

They didn't get where I was coming from with our kura and when I gave my presentation someone said to me, 'I had this vision of a waka and the paddles', but for me at a Māori kura, it's about iwi and that bigger picture, it's not just the school ... To be able to work alongside other Māori principals would have been better. Collaboration with other schools in our region was good but with Māori would be better. (Principal G)

We did tend to dominate the conversation because we have all these bigger issues we tried to work through. It might be nice if we were doing that with another special school rather than mainstream schools who couldn't relate to what we were saying. (Principal E)

Te wā | Timing

All participants suggested an improvement related to timing of the programme.

Half requested a longer programme offering more time in the development period of the BSC so they could gather relevant data and consult with others to inform their scores, or to have the BSC before the SLPP.

It felt compressed and quite tight and quite pressured. It's probably always going to be tight and pressured. But maybe it could be something like the SLPP, which I think is more over a sort of an 8- to 10-month time frame. That's something that I think could be changed and potentially improved. (Principal A)

I probably would have liked the balance scorecard at the start before the strategic planning as it would have had more of a flow on effect. (Principal G)

Advanced scheduling, by booking check in dates and times one term ahead was a common request.

We sometimes don't get much notice ... my calendar gets booked up really quickly. So when [Springboard Trust] say they got this meeting for three hours in the morning on one particular day I think 'ah, can't go' so that's how I've missed them. (Principal E)

Some suggested after-school check ins to enable teaching principals to attend.

I've been teaching nearly full time, so I just haven't been able to attend. In the rural schools there are so many of us that end up teaching more. You can't [get relief] too often because it blows the budget. (Principal H)

Although most principals felt the 10-year horizon was a strength, some found this challenging.

It's almost like kind of crystal ball gazing. What's [going to] work for the team, the leadership team and the board, 10 years from now. It is a really, really, long timeframe. I totally [understand] in the business world that's a normal timeframe. That's two cohorts in a primary school setting, two whole lots of children will be through and gone. There are such big changes in a school over 10 years. Big changes in education too. That is three governments, and we know the impact that government has on education. (Principal G)

8. Te aronga ki tua | Next steps

Me aro ki hea? | Where do principals see this going next?

All principals interviewed intend to continue to use the BSC and value it as a tool to create a clear, strong strategic direction that is the basis of a long-term community plan with stakeholder input and a way to measure success specific to their local context.

Key supports that principals would like from Springboard Trust include:

- access to strategic leadership and BSC programmes for all principals
- ongoing check ins to keep on track
- maintaining communication with their cohort as a community of practice
- new programmes to consider cohort groupings by the same type of school
- matching of capacity partners to meet individual school needs
- offering access to a growing bank of objectives and measures
- one-on-one support for developing measures for BSC
- follow-up programmes that support implementation of BSC and how to initiate actions from measures.

When asked “What changes do you hope to see in your school over the next 5 years?”, all the interviewees clearly articulated their vision and how the BSC will contribute to this.

100% collaborative. We want to grow people and resources ... lots of building ... We want to maximise our partnership with the college because geographically they are right next door, and we have relationships with each other because we teach their kids ... they teach our kids. We always keep strengthening our teaching and learning. I think one thing I've really appreciated with BSC is it's helped us to frame up who we are and who we want to be, so that we can stay true to us. (Principal D)

School leaders' concerns with identifying the most important cause-and-effect relationships to know which are the most important measures for strategic objectives may be alleviated by exploring the use of stakeholder maps. Considering the time-poor nature of senior school leaders, these relationships may be best distilled by professional development providers or evaluators and offered as narrative case studies or tools to be trialled by willing participants experienced with the BSC framework, with support from Springboard Trust.

Te whakamahere | Stakeholder maps

Many principals were self-reflective on the response or lack of engagement from different members of their school community. Questions were raised such as: How are we going to encourage engagement or approach measurement in ways that uphold mana and incorporate diverse values?

Acknowledging that different stakeholders and contexts require different ways of communicating to gain perspectives of what is important and different ways of implementing actions to achieve shared goals, it may be advisable to explore stakeholder maps to help leaders to answer: “Who are our stakeholders?” and “What is at stake?”

He arotakenga anō | Further evaluation

This formative evaluation approach was designed to provide Springboard Trust with a snapshot of the impacts of the BSSA and SM4S programmes and continued use of the BSC by principal participants, at this point in time. This information could be used to contribute to further evaluation by:

- using recommended questions for ongoing surveys or discussion in BSC cohorts
- developing a Theory of Change for the programme to help guide facilitators and participants in practice and longitudinal impact evaluation
- recommending Springboard Trust develop a database of artefacts from willing principal participants, such as BSCs, effective measures, stakeholder maps, and narrative case studies.

Te horopaki o te ao | International context

The experiences of this small sample of principals in Aotearoa in the use of the BSC, as facilitated by Springboard Trust, mirrors the international trend of implementation of BSC in diverse environments, creating diverse responses. The value of the BSC in improving strategic management, employee engagement, and multi-criteria decision making described in educational settings is documented internationally, albeit predominantly in higher education (De Jesus & Alves, 2023). The contribution Springboard Trust can make to this emerging field is in documenting the importance and evolution of BSC as a strategic management tool in a range of primary, intermediate, and secondary school settings in Aotearoa.

Hei whakakapi | Concluding statement

The interviews conducted with principals who participated in Springboard Trust's four Balanced Scorecard programmes from 2022–23 indicate that these senior leaders are gaining significant added value to their strategic leadership and impact, collective purpose, and planning processes by implementing the BSC approach in schools.

Responding to the evaluation questions, we look beyond “What is working well for principals in BSSA and why?” to consider what is working for which principals, under what circumstances. There have been consistent indicators of value and positive impact on strategic leadership through the three evaluations to date: Springboard Trust pilot evaluation, SLPP, and this evaluation.

Although the BSC perspectives are holistic and interconnected, principals are concerned that unseen barriers to equity and inclusion due to culture, learning needs, or physical limitations may go undetected, due to the broad and overlapping nature of the four BSC perspectives. Principals have offered practical solutions to overcome this by aligning other evidence-based frameworks and their school community values alongside the BSC. There is a common thread across these evaluations that suggests including culturally responsive models alongside the BSC framework would broaden the positive impact of BSSA to be inclusive of the needs of all ākonga and help tumuaki Māori find relevance in the programme.

All principals interviewed value Springboard Trust's programmes highly, discussed their current and intended future use of the BSC, and would like more contact and support from the Trust. The challenge currently facing this cohort is implementing effective measures to assess progress on their objectives, and they have requested support from each other and Springboard Trust for this next phase in the growth through a community of practice and database of measures and exemplars.

They also wish that their colleagues, particularly beginning principals, have access to the professional development they have gained, by right, preferably by expanding the services of Springboard Trust. They are also willing to share their experiences and resources on an ongoing basis if Springboard Trust has the capacity to co-ordinate ongoing check ins and opportunities for communication.

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He āpiti hanga | Appendix

He pātai uiui | Interview questions

These first questions are about strategic leadership, impact, and identifying measures.

1. As a principal, how does using the Balanced Scorecard add value to your strategic leadership practice?
Prompts: How has the BSC contributed to your strategic impact? planning processes?
2. What do you think about the use of the four perspectives in the BSC?
Prompts: As a reminder, these are: Academic Learning; Teaching and Leadership; School Culture and Community; People, Tools, and Resources. In your view, are these the right perspectives to be focusing on? Is anything missing? Are there areas of overlap? Are there any priorities or objectives in your context that you're not sure where to place?
3. What have you used to make judgements about where to score your school on these four perspectives?
Prompts: What measures have you chosen/used to track progress on your targets? How did you choose these? Did you find it hard to choose measures for any of the perspectives?
4. What might help you and other principals in selecting appropriate measures, and interpreting this information?

These next questions are about increasing equity, communicating, and support.

5. In what ways is the BSC contributing to improving equity and inclusion in your kura/school:
 - for ākonga Māori and their whānau?
 - for Pacific learners and their families/communities?
 - for all ākonga and their whānau?
6. What have you learned from developing your own BSC?
Prompt: What have you learned from sharing with other principals and reflecting on each other's BSC?
7. Who else have you shared your BSC with, and what has been the impact of this?
8. Have the 3-, 6-, 12- month check ins been valuable for you? How? If not, why not?

These following questions are about how to improve the programme.

9. What do you think could be changed or improved about the programme?
10. How does the BSC compare to, or align with, other frameworks and approaches you use in your school leadership?
Prompts: Is it more useful, less useful, does it work well alongside other approaches?
11. Have there been any surprises or unintended consequences of using the BSC?

These final questions are about next steps.

12. What changes do you hope to see in your school over the next few years?
Prompt: To what extent do you think these changes could be attributed to the BSC approach?
13. To what extent will you continue to use the BSC approach? Why/why not?
Prompts: *What will this look like in your context? What supports/further development would you like to see in the Springboard Trust's Balanced Scorecard Approach?*
14. Is there anything else you'd like to say before we finish the interview?

