



Leading with Data: A Conversation with T.J. Locke

EAB and The Episcopal Academy | Erin Rehel, PhD and T.J. Locke, Ed.D

October 9, 2018

Independent School
Executive Forum

Today's Presenters



Erin Rehel, PhD
Practice Manager
Independent School
Executive Forum



T.J. Locke, Ed.D.
Greville Haslam Head
of School
The Episcopal Academy

Audio Options



Using Your Telephone

If you select the “Phone Call” option, please dial in with the phone number and access code provided.

Choose ONE of the audio conference options

Phone Call Computer Audio - Connected Call Me

Dial: +1 669 900 6833
+1 646 876 9923

Meeting ID: 222 255 629

Participant ID: 24

Done

Using Your Microphone and Speakers

If you select the “Computer Audio” option, please be sure that your speakers or headphones are connected.

Choose ONE of the audio conference options

Phone Call Computer Audio Call Me

Join Audio Conference by Computer

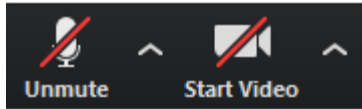
Test Computer Mic & Speakers

☐ Automatically join audio by computer when joining a meeting

Using Zoom

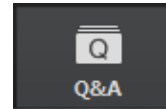
Mic and Video Controls

Click the mic and camera pictures until they have a red line indicating they are both off.



Asking a Question

To ask the presenter a question, type it into the Q&A panel and press send.





Leading with Data: A Conversation with T.J. Locke

EAB and The Episcopal Academy | Erin Rehel, PhD and T.J. Locke, Ed.D.

October 9, 2018

Independent School
Executive Forum

Two Important Challenges Drive Change

Inconsistent Use of Data at the Heart of Challenges



Lack of Visibility Leads to Micromanagement

Head of School spending time "in the weeds," insufficient capacity for "big picture" issues, long-term strategy



Team Spends Little Time Celebrating Quick Wins, Successes

Relentless pursuit of improvement leaves little room to recognize progress made, achievements



School in Brief: The Episcopal Academy

- Co-educational day school for grades Pre-K through 12 in Newtown Square, PA
- Founded in 1785, affiliated with the Episcopal Church
- Dr. T.J. Locke has been Head of School since July 2013

Dashboards Used to Address Key Challenges

EA¹ Created Dashboards Across Nine Non-Academic Functions

Finance and Operations



Admissions



Finance



Advancement



**Auxiliary
Programs**



**Facilities/
Operations**

People and Processes



Human Resources



Diversity



Athletics



Communications

Quantitative, Qualitative Data Shared in Dashboards

"Highlights/Important Notes" Section Use Varies by Audience

EA Advancement Dashboard
FY18 as of 1/31/18 for Feb 1 2018 Reporting

FUNDRAISING REPORT

ANNUAL OPERATIONS	2013-14	2014-15	2015-16	2016-17	FY17 YOY OPS	2017-18 (as of 1/31)
The Episcopal Fund	0,000,000	0,000,000	0,000,000	0,000,000	0,000,000	0,000,000
EITC/OSTC/BLOCS	0,000,000	0,000,000	0,000,000	0,000,000	0,000,000	0,000,000
<i>Subtotal</i>	0,000,000	0,000,000	0,000,000	0,000,000	0,000,000	0,000,000
TEF Pledge Balance	N/A	N/A	N/A	N/A	N/A	00,000
Restricted Operations	000,000	000,000	000,000	000,000	000,000	000,000
CAPITAL (Gifts and Pledges)	2013-14	2014-15	2015-16	2016-17		2017-18 (as of 1/31)
Endowment	0,000,000	0,000,000	0,000,000	0,000,000		0,000,000
Non-Endowment	00,000	0	000,000	0		0
<i>Total Capital</i>	0,000,000	0,000,000	0,000,000	0,000,000		0,000,000
TOTAL FUNDRAISING	2013-14	2014-15	2015-16	2016-17		2017-18 (as of 1/31)
Total Raised to Date	0,000,000	0,000,000	0,000,000	0,000,000		0,000,000
PARTICIPATION GIVING	2013-14	2014-15	2015-16	2016-17		2017-18 (as of 1/31)
Trustees	100%	100%	97%	100%		100%
Alumni	25%	25%	26%	28%		11%
Current Parents	63%	63%	60%	67%		48%
Current Grandparents	11%	13%	12%	10%		5%
Faculty/Staff	99%	93%	96%	96%		64%

CAMPAIGN REPORT

TOTAL RAISED	Total Gifts & Pledges	Cash Received
Financial Aid	0,000,000	0,000,000
Faculty	0,000,000	0,000,000
Program	0,000,000	0,000,000
General	0,000,000	0,000,000
NonEnd	0,000,000	0,000,000
Total	0,000,000	0,000,000

Note: Campaign total includes \$XX in planned gifts.

HIGHLIGHTS/IMPORTANT NOTES

Remove any sensitive highlights/notes and share with Board members and applicable committees/task forces

REPORTING SCHEDULE

*** CONFIDENTIAL INFORMATION ***

Last Updated:

1/31/18

Remove any sensitive highlights/notes and share with Board members and applicable committees/task forces

Positive Initial Feedback Sustains Momentum

Board, Administrative Team Benefit from Dashboards

1

Board-level **Visibility**

- Board now has access to right level of data to enable strong leadership without getting mired in details
- Well-thought-out dashboards cover key data in given area, enabling school leadership to proactively provide insight

2

Reduced **Micromanagement**

- Agreed-upon metrics provide complete picture of a given area, minimizing over-analysis of available data
- Administrators able to track, document improvements, share progress with team, head of school

3

Data-Driven **Decisions**

- Decisions informed by available data, trends
- Impact of changes easier to assess, track over time

4

Greater **Transparency**

- Greater visibility into performance, progress across teams
- Successes, progress celebrated regularly, maintaining team engagement

Future Opportunities to Better Use Data



Complete Data Picture

- Incorporate data from other sources, such as INDEX, into current dashboards; benchmarking data can be particularly valuable



Additional Dashboards

- Assess remaining aspects of school that could benefit from dashboard
- Goal should not be dashboards for the purpose of having dashboards



College Counseling

- Shift in college placements over time, regular questions on from Board prompt consideration of dashboard in this area

Future Opportunities to Better Use Data



Complete Data Picture

- Incorporate data from other sources, such as INDEX, into current dashboards; benchmarking data can be particularly valuable



Additional Dashboards

- Assess remaining aspects of school that could benefit from dashboard
- Goal should not be dashboards for the purpose of having dashboards



College Counseling

- Shift in college placements over time, regular questions on from Board prompt consideration of dashboard in this area

When a Single Dashboard Isn't the Right Answer



College Outcomes Summary (2016-2018)				
	2018	2017	2016	
Class size				
Total applications				
Applications per student				
High school admission rate				
Global admission rate (%)				
Results by Admission Plan (2016-2018)				
	2018	2017	2016	
Early Decision Applications				
Admissions				
Enrollments	67	74	78	
Admit Rate (%)				
Early Action Applications				
Admissions				
Enrollments				
Admit Rate (%)				
Restrictive Early Action Applications				
Admissions				
Enrollments				
Admit Rate (%)				
Matriculation Summary (2016-2018)				
	2018	2017	2016	
Enrolling Students	118	131	133	
By Institution Type				
US - 4 Year Public	28%	15%	22%	
US - 4 Year Private	72%	83%	77%	
US - Community College	0%	0%	0%	
International - Public	0%	2%	2%	
International - Private	0%	1%	0%	
Not Categorized	0%	0%	0%	
Total	100%	100%	100%	
Total Early Applications				
Applications				
Admissions				
Enrollments				
Admit Rate (%)				
By Region				
Northeast	13%	16%	16%	
Mid-Atlantic	51%	55%	50%	
South	19%	19%	20%	
Midwest	6%	2%	8%	
Mountain	4%	2%	3%	
Pacific	7%	4%	2%	
International	0%	2%	2%	
Total	100%	100%	100%	
By Selectivity				
Very selective (<25%)	35%	32%	35%	
Selective (25-50%)	40%	45%	42%	
Less selective (>50%)	24%	17%	18%	
Not categorized	2%	6%	5%	
Total	100%	100%	100%	
Early Mix Trends				
Applications (% of total)				
Admissions (% of total)				
Enrollments (% of total)				

“A dashboard doesn’t work in this case because [college admissions] is such a complex thing. **You can’t look at it on just one sheet.** It’s hard to summarize everything on one dashboard, so we went with a fuller report.”

*T.J. Locke,
Head of School,
Episcopal Academy*

Progress, Not Perfection

“From ‘we should have a dashboard’ to the place where you have what you like, it’s such a big journey... It’s so easy to get trapped in ‘we have to create the perfect system,’ that you don’t get anything done unless you spend a lot of money and a ton of time. This was an attempt very quickly to throw down what we care about in each of these areas and start tracking it, then refine it later. **It’s a way of jumping in the pool and getting wet without worrying about if you’re an Olympic swimmer.**”

*T.J. Locke, Head of School,
The Episcopal Academy*

Thank You for Joining Us!

Please Do Let Us Know If You Have Questions



Erin Rehel, PhD
Practice Manager
Independent School Executive Forum
erehel@eab.com
202-266-5772



Washington DC | Richmond | Birmingham | Minneapolis

202-747-1000 | eab.com