

Engagement for Success:

Monroe County School System's Fully Aligned and Integrated Balanced Performance Improvement System

Overview

Innovation at a Glance

The Monroe County School System (MCSS) worked as a group of system and school leaders to develop and implement a Balanced Performance Improvement system by using tools such as aligned continuous improvement plans, Balanced Scorecards (BSCs), visual reporting, and annual reports.

Impact at a Glance

MCSS experienced greater accountability from its staff after becoming fully aware of the performance measures for which they were responsible. The district used its four performance principles to develop greater accountability and awareness of goals and the process of systemic change. As a result, student achievement factors were positively impacted through constant monitoring of performance measures.

The Impact Story

Background/Context

Located in middle Georgia, MCSS serves approximately 4,000 students and 525 employees in six schools: two elementary schools, two middle schools, one high school, and an alternative school. The student population is 63 percent white and 35 percent black, with approximately 50 percent of its students qualifying for free or reduced lunch.

What Was Done?

MCSS pursued a continuous improvement model focused on improving performance. To provide this focus, aligned continuous improvement plans, Balanced Scorecards, visual reporting, and annual reports of progress to the Board of Education (BOE) were implemented to create a fully integrated Balanced Performance Improvement System.

In 2001, several events occurred that led MCSS Superintendent Scott Cowart to change the way his system managed and planned the district's and schools' continuous improvement initiatives. First, Superintendent Cowart heard Superintendent Stephen Dolinger of Fulton County Schools give a presentation on the use of the Balanced Scorecard (BSC), and was impressed by the district success Fulton experienced. Superintendent Cowart and Assistant Superintendent Dr. Maggie Bowden had already started developing aligned continuous improvement plans for the system and the schools and had begun collecting and analyzing external and internal data. Cowart enrolled a district team in the Georgia Leadership Institute for School Improvement (GLISI) core leadership development program – Base Camp and Leadership Summit – with 10 of his school leaders. These

two events, along with increased state and national accountability, compelled Cowart to pursue new strategies to develop and design a Balanced Performance Improvement System within the district. The Superintendent and Assistant Superintendent were working with the system leadership staff to develop a mission, vision, and guiding principles. In the same year, the staff started the annual project of surveying the staff, student, parent, and community stakeholders on their knowledge and perceptions of the school system. Additionally, the district held a community forum to gather stakeholder input on the direction the school system was taking. This data, along with demographic and improvement data, formed the first comprehensive look at the district's current state of performance. "The light bulb went on" as Cowart says, when he realized that "the aligned continuous improvement process taught by GLISI is more than just creating a plan. You have to measure performance, monitor it, strategically manage it, and communicate it." Cowart and Dr. Bowden realized the aligned continuous improvement plans used in partnership with a BSC would move the district toward a more strategic way to improve performance. With the help of GLISI and Dolinger, Cowart started to develop a BSC to complement work the district was already doing.

Developing Balanced Scorecards: In 2002, GLISI put together a BSC Community of Learning and Achievement (COLA) at the request of superintendents participating in its core leadership development program, Base Camp and Leadership Summit. In this BSC COLA, leaders from all over the state at varying levels of BSC implementation gathered to learn from each other and develop a network of BSC learners and experts. Dolinger presented Fulton County's use of the BSC and its successes, but also shared lessons learned, including discussion of what worked and what didn't, to help at each level of implementation. Cowart immediately saw the connection between the work he was already doing with his district and school continuous improvement plans and the accountability indicators he was trying to measure. As a result, in 2002-2003, MCSS implemented its first BSC for the district and all the schools. As a leader successful in developing Monroe's BSC, Cowart was asked to co-teach the BSC training with GLISI's Senior Executive Director, Deb Page, to help other districts see that there was an opportunity to gain the success and alignment that Monroe County was experiencing.

Using the BSC as a reporting tool: By 2003, the Monroe leaders had successfully implemented the BSC in their district and schools and were using the BSC as a communication tool for all stakeholders, including the Monroe BOE, parents, and even students. The formal report of progress to the BOE began with the district's first Annual Report in the summer of 2003. Despite the fact that the process met some of the initial challenges faced by any innovation, the work received such positive feedback that the system sought further information about the BSC and a performance culture.

Visual reporting: In 2003, GLISI organized a bus trip for Georgia K-12 leaders to Jacksonville, Florida to see the work that the Duvall School District was doing to implement standards-based teaching and assessment and how leaders were using data to drive improvement. This trip introduced Superintendent Cowart to another valuable tool that he could align to the performance improvement process. Duvall County had created a "data room" in which all of the measures and goals they were tracking for the entire system were displayed on the walls of one room. The purpose of the data room was to allow everyone to easily see the results that Duvall was making toward its

targeted goals and measures, as well as to understand the areas in need of improvement. The Monroe Superintendent saw the data room and immediately knew that it would be a complement to Monroe County's aligned continuous improvement plans, BSC, and Annual Reports.

Superintendent Cowart went back to Monroe with clear ideas of how to proceed, and in 2003-2004 he and Bowden completed a data room for the system and each school where the data was organized into the three strategic goal areas on the district's BSC. "The staff at MCSS were really starting to track their data and use the BSC to plan for and manage the performance of the system and their schools," recalls Cowart. "We stressed that the introduction of the BSC and the data rooms was a process, not a program." The three strategic goals of the BSC became the foundation for execution in MCSS because it was the way they structured meetings, the way they organized their data, the way they measured progress, and the way they planned for improvement. The district also used the Balanced Scorecard and the data rooms to develop their annual reports and presentations for MCSS's stakeholders. The key to the integrated Balanced Performance Improvement System was relating all the pieces they were doing around monitoring and sharing their results to ensure that each piece worked with the others.

Alignment to goal areas: To fully cascade the Balanced Performance Improvement System, the district took other steps to ensure alignment of all aspects of the improvement process. One step was to align job descriptions and performance evaluations to the behaviors, tasks, and skills needed to meet the goals of the continuous improvement plans, BSC, and annual reports. Another important step was the development of periodic Performance Reviews for each school and department, built around the three strategic goal areas of the BSC. These quarterly reviews served to help everyone focus on the leading indicators that would impact the final performance recorded on the BSC. As the district delved deeper into process alignment, they were able to align other personnel and instructional processes to help staff members see the connections to the improvement process. The aligned processes included new staff orientation, teacher induction, and instructional planning. This alignment focused attention on the three strategic goal areas of the continuous improvement plans, and BSCs, data rooms, and Annual Reports worked successfully to ensure the integrated Balanced Performance Improvement System produced the system's desired results.

What were the Results?

The aligned continuous improvement plans, BSC, visual reporting, and annual reports were developed, integrated, and used as the ways the system measured, structured and presented the data in the three strategic goal areas to staff, other stakeholders, and the BOE. The district's use of continuous improvement processes helped to turn the wheel of change and set in motion the dynamic energy needed to increase the rate of change. The annual reports not only allowed the BOE, business leaders, parents, staff, and students to see the improvement in their schools, but also made the school and systems leaders more accountable to themselves and their stakeholders. These tools led to a truly integrated Balanced Performance Leadership System which allowed Monroe to pinpoint areas providing opportunities for improvement as well as leading measures to monitor throughout the year.

What was the Impact?

Cowart illustrates the impact of the integrated Balanced Performance Improvement System by recounting the story of the first time he and his team presented to the Monroe County BOE using the annual reports and the data from the BSC. "Each of our principals was given a few minutes to share their data based on the indicators and measures of the district and their school's BSC. After the first principal presented, the Board remained surprisingly silent, which became a pattern after each principal and I presented results to the Board. I was actually becoming more nervous about the silence than the results. After all principals and the system had presented their data, one Board member finally spoke up. He remarked that he saw a 'disturbing pattern' during each presentation: each school had an attendance problem in which the percentage of students missing 15 days or more of school was in the high teens." Even Hubbard Primary School, a Title I School of Distinction that year, reported that 18.3 percent of their students missed 15 or more days. By identifying school attendance as a system-wide issue – a direct result of the annual report presentations – the Board charged the principals with improving student attendance by the next year. This charge became a new focus, and the leaders returned to their schools, parents, and communities to strategize additions to their continuous improvement plans for improving student attendance. The following year, every school but one showed significant improvement in student attendance. The one school that did not meet expectations had to explain why they did not meet the goal given to them.

Cowart noted, "The BSC helped the principals to report the data – and almost more importantly – provided the BOE with a way to interact with the schools and give expectations on which the principals could focus. Clear expectations and monitoring helped make the needed results happen." Other results for Monroe County were the creation of a performance culture, where a critical mass of stakeholders agreed to accept responsibility for identified targeted results, improved system stability, accurate knowledge of past and present performance data by internal and external stakeholders, clear targets and expectations for the future, and achievement of desired results. The success of the MCSS model is evidenced by the fact that it has garnered numerous awards and recognitions based on consistent, pervasive, and sustained gains in student achievement, including the fact that 100 percent of their schools and the district met Adequate Yearly Performance (AYP) each of the last three years.

Next Steps

MCSS will continue to work on aligning all efforts to the three strategic goal areas of the BSC, as well as further focusing on using the Balanced Performance Improvement System to strategize future plans and communicate with stakeholders.