



# Sabu, Inc. Fax MEMO

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TO: Larry Bowers

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SUBJ: Memo No. 2: Connecting the 3 Questions:

Larry:

Here are the thoughts you requested about connecting your three questions...

1. How does MCPS build capacity to utilize *Baldrige* in 9000 classrooms?
2. How does MCPS roll out this particular innovation to 10,000 teachers?
3. How does MCPS engage students in the management of their own progress utilizing *Baldrige*?

...into a possible strategy that might address the district's present time and resource pressures.

My thinking about this strategy began by starting with question #3 and then turning #1 and 2 into "Why?" questions. Why would 10,000 teachers in 9000 classrooms led by several hundred principals want to engage in that process in all their classrooms?

- It seems clear to me why the *district* would want that to happen. While the core business of the school system is *instruction*, those who see themselves on the "instructional" side of school systems (as opposed to the "business" side) find it difficult to understand "process improvement." At the root of their difficulty are assumptions on which their work processes are based that come from a view that their work can be accomplished by isolated, relatively autonomous practitioners -- teachers, principals and superintendents. MCPS, however, has attacked that culture with several investments in *process* improvement, including two current ones -- the integration of the *Baldrige IMS* as a structure for school improvement planning, and development of systemic support for principal's *Instructional Leadership* roles through new standards, support and assessment.

These current development processes represent a district commitment based on a sense of their importance. This translates into an investment of resources for those two at a time when they are shrinking overall.

- But why would *school staff's* want to invest their most critical resources -- their time and energy -- to understand and integrate these new processes in the continual 24/7 demands of their work and changing work context?

Is there a possible strategy that could leverage *their* resources in ways that would get more bang from the district's already-committed bucks? My own answer comes from looking at this situation through principals and teachers eyes, and in particular, Eva Wetten's journey from little knowledge of *Baldrige* to the operating model she's leaving in her school today.

- Here's where I start with your 3<sup>rd</sup> question about student's co-managing their own learning, and look at the take away *aha's* people have when they see it happen in *Waters Landing's* and classrooms like it here and certain other districts across the country. Especially important are the insights of those participating in it as teachers, students, parents, principals and other school staff.

When I've listened to teachers and principals here and in other districts that have built their work around this model of *co-managed* instruction, I hear one major answer to the *Why?* question. Time! First, by engaging the student's time for meaningful participation in the work of *learning*, it makes it possible for the student's management of his/her own time for *learning* to be a manageable component of *teaching*.

This then frees up much needed time for the adults around him/her to support that learning. What happens in these schools is, in effect, a *co-managed teaching* process involving principal and staff as that time is devoted to using the "data" resulting from the learning process to continually improve it. It also provides a way to engage parent time more productively. (I have lots of examples from around the country to support this but it would take up too much space here.)

It seems clear though (at least to me) that the better student achievement "results" in these classrooms is directly related to the redeployment of school's most critical resource - time -- and it's application to what people in schools already feel they must or could do... if they only had time and support.

- For the school site, as well as the district, the work process evident in those classrooms produces results in both the effectiveness and efficiency of the interdependent core work processes of learning and teaching. From the district's perspective however, there is an additional reason why *efficiency* factor is the key driver.

This other dimension of efficiency comes from the content- or curriculum-free nature of the *co-management* process. It works as a way of thinking about, organizing and managing the work of instruction and learning regardless of discipline or grade level. This means that the district's support processes (e.g., training, data and information support, technical assistance) can be aligned to serve the *common work of instruction*. (It also helps clarify the Community Superintendents role, but I won't go into that here.)

- So this is why it makes sense to me that MCPS wants to get this into *every* classroom in *every* building as *quickly as possible*. But how? Is the present systematic roll-out sufficient to match the scope and timing of that need?
- July's workshops for a pilot group represents a sound design for integrating a new idea -- the ways of thinking and managing incorporated in the *Instructional Management System (IMS)* -- into the *SIP* process, something schools already are "required" to do (whether or not they ever can act on those "plans.") The intention is to move the idea of "improvement" from a planning, to a continual operational, concern and process.

(I should note here that the district is referring to the *IMS* as "Baldrige," but the national and many state, Baldrige folk don't see it that way. And I've noted in conversations around the district that this is a point of confusion.)

As I hope my thinking, above, suggests there are sound reasons why the district wants the *SIP/IMS* integration to happen as soon as possible, so I'll return to my question: why would principals and teachers want to do this? And are traditional roll-out or deploy-down training processes the only alternative for accelerating that need?

- As I've tried to look at it through their eyes to see what some initial answers might be, I found myself returning to my current experiences sitting-in on some the *A&S PGS Design team* meetings, as well as to Eva Wetten's story of her journey from little knowledge of Baldrige to the operating model she's leaving in her school today. Both suggest that the "Baldrige" you and Jerry both understand has to be linked to something principals and teachers will feel meets *their* needs to make more of a difference with kids than they can now... regardless of how effective they already may be.

I'll start with Eva's "story" because I think it illustrates the interconnected way changes in methods and mindsets happen, the places where a district can influence it, and may have direct relevance for the pathways you want other principals to take in their learning and application.

My "data" is not up-to-date, but as of about a year and a half ago, this is what I believe had had happened:

- She originally got interested in "Baldrige" at a *TrendBender* small group session presented by Jodi and Matt. The ideas resonated with her, but didn't seem new. She was familiar, for instance, with "Baldrige tools" from prior facilitative leadership training.
- Then she had some time away from school - while breaking in new principal - and went to a conference where she heard Gerry Anderson (then Brazosport TX superintendent). She took away from that the key *20%/80%* principle: focus on the critical 20% and the other will follow. But what was her 20%?
- She then heard Mike Schmoker and Doug Reeves and realized that her building's 20% critical area was written language. But back in school she realized that her teachers didn't understand writing as a craft, and how to assess it. Everyone wanted it as goal, but didn't know how or what to do. And she didn't either.
- At the NAESP convention she met Marcia Freeman and heard about her model of writing instruction and what it was possible to do with it.
- She then had opportunity to go to Mechanicsville with the Walter Johnson cluster and "saw the kids doing it" (co-producing learning) "...and it hit me."
- From that point on Waters Landing began to combine the two processes that effectively integrated the *what* and *how* dimensions of writing instruction.
- At the time I talked with her she was seeing several dimension of *meaningful* outcomes or results beyond student achievement. For example,
  - Her experience with district attempts at improvement had been one of "many competing ideas...programs...all happening at once, and seeming to come down to them fragmented in separate pieces leaving it to them to connect." "How do you pick and choose?" she asked, and found that *Baldrige* thinking gave her a "laser focus for determining what to do and not to do."
  - "can't believe how much accomplished [in her school] in the last year"
  - "...everything [like district's staff development, data support, etc.] seems to support it..."
  - several of her people now becoming "consultants".... [effect on people growing]

- tapped pockets of expertise in the building from prior initiatives such as facilitative leadership
- "role release" -- empowers other staff to do aspects of roles she has had to play.

- Finally, during NIST's 2002 *Quest* conference she found that the winning Baldrige business leaders validated what she does *intuitively* as a leader, and she hadn't ever has a chance to think about why.

- So in terms of advancing the scope and pace of the effects of Baldrige, my take-away from her story suggests that whatever happens it must go beyond helping people feel they're doing it to meet district requirements, and must make sense in terms of what principals and teachers feel they need to do... and, at the same time, help them make sense of better ways to do it.
- And this brings me to a possibly similar condition I've noted as I've sat in on A&S PGS Design Team meetings. Its end product will be a delineation of the *instructional leadership* roles they will be expected to *perform*. Its most immediate product however will be a test of its evaluation component.

On the one hand, while the new performance standards for *instructional leadership* are conceptually sound, they also are generally perceived as *impossible* to fulfill without additional time and resources. And experience offers them little sense of how a principal *can* do all this "new stuff" in the context of what they *know* their role actually entails. Yet, they are to be held accountable for, and evaluated on, these criteria.

Specifically, there is a fear of unanticipated consequences from having to "pilot" an evaluation process derived from it by next semester. Yet this development work does need to take some form that can be tested and modified from this early experience. So I'm suggesting, as the Chinese do, that this "problem" also offers an "opportunity."

- A critical step to acceptance of the new performance standards will be a sense that it is possible to perform that way within the total context of their present work -- the answer to their "how?" question. And my concern for the efficiency of district and school staff time and resources leads me to ask how they could experience a "process structure" that might serve as a supportive scaffold for instructional leadership until principals own experiences enable them to integrate the new behaviors into their work?

The for my answer is that the *IMS* offers a scaffold that can enable them to "perform" in alignment with the new *Standards for Instructional Leadership* upon which they will be evaluated. And also, that it will not be hard to make a cross-walk between the new Performance Criteria for A&S Instructional Leadership and the Baldrige Criteria for Performance Excellence embedded in the *ILS*. (In fact, I imagine that if I could sit down with Eva, Judy Lewis, Mike Perich, Karin Rabin, Jerry Perlet and a couple others for an hour or so we could make a good start on it. This would also test the hypothesis.)

- If my hypothesis is correct, then what if the "Evaluation" process could be piloted in the same schools taking part in the *SIP/IMS* pilot? It would take some re-thinking in terms of the design but it could mean that the outcomes of the July training would produce "data" to feed at least two parallel development tracks that in the end will provide the answers to your 3 questions:

(1) It would help principals use the *IMS*'s capacity for managing the expected continual improvement *performance* posed by the new standards, and this would drive up that way-of-thinking and acting to the 9000 classrooms and 10,000 teachers those principals lead and manage. And,

(2) at the same time, align the district's *capacity* to support those new performance standards through:

(a) helping identify the Community superintendents' *Instructional Leadership* roles required to support principals,

(b) reinforcing the critical role of OGAT's "IMS" (sometimes called IQMS) in serving the *just-in-time* formative feedback requirements of both the *co-managed teaching/learning* model and the *Instructional Leadership* Standards. (Hopefully, this might someday facilitate moving some of OGAT's "IQMS" development costs out of the "technology" budget which always has a lesser priority in the public's mind than what they think of as "teaching and learning.")

(c) building on the *capacity* (new roles and relationships) the district has committed to in its strategic plan that are already developed, and under development, but which aren't called, or thought of, as "*Baldrige*."

- One final practical and strategic value of an approach like this could be its effects on the present problems of language and meaning -- e.g., "Baldrige" being used to describe the organizational alignment process and the classroom/building management process; "IMS" used for that classroom/building management process and OGAT's formative information feedback process.

For example, (and this might make sense only to me because of my perspective) but what MCPS seems to be uniquely doing is developing its capacity as a total coherent, manageable system -- an "***Integrated Learning Management System***" (***ILMS***) that increasingly aligns "everything" to the needs of the work called "learning" and "teaching." Isn't that, in effect, what the answers to your 3 questions will put in place?

So I'll close with a question of my own. What might happen if MCPS claimed that concept so that the ***ILMS*** could provide a critically needed framing concept for understanding *how* and *why* all your actions fit and make sense? Could it facilitate the scope and timing of its continuing development?