

*Mrs. DiFonzo joined the meeting during the discussion of the policy.

Board members reviewed the following proposed policy on site-based participatory management:

A. PURPOSE

To define, encourage, and support site-based participatory management in the Montgomery County Public Schools

B. ISSUE

Reports have been published over the last decade recommending changes in American public education. Of particular concern in many of these reports has been the system of top down decision-making.

Site-based participatory management and similar terms are being used in hundreds of districts across the country as they endeavor to restructure and improve teaching and learning in their schools. Many programs are based on the belief that those closest to students should be given as much flexibility and authority as possible to exercise their best judgments to create learning, cooperative school communities whose aim is to improve student achievement. However, there are no generally accepted definitions for these terms, and practices and conditions vary widely from district to district.

One of the recommendations of the Commission on Excellence in Teaching, published in 1987, was that the MCPS system of decision-making should be restructured at all levels. In 1988 MCPS launched a nine-school "flexibility pilot" as the result of work by several committees composed of administrators, teachers, support staff, and parents. Pilot participants, the superintendent, and the Board of Education now believe it is necessary to have a policy to define and guide further expansion of site-based participatory management and to support its further expansion in the Montgomery County Public Schools.

C. POSITION

1. Definitions

- a. Site-based participatory management is the restructuring of decision-making and authority in schools and other worksites to ensure the active involvement and participation of administrators, teachers, support staff, parents, secondary school students, and their constituent organizations in

decisions that affect student learning in a school. It requires these participants to accept increased responsibility and accountability for working together cooperatively to:

- (1) Develop and implement the school improvement management plan
 - (2) Determine goals, structures, and processes in schools and other worksites that improve the learning environment and student learning outcomes
- b. Constituent organizations refer to the countywide organizations that are the recognized representatives of teachers and other staff (Montgomery County Education Association), supporting services staff (Montgomery County Council of Supporting Services Employees), administrators (Montgomery County Association of Administrative and Supervisory Personnel), parents (Montgomery County Council of Parent Teacher Associations), and secondary students (Montgomery County Region, Maryland Association of Student Councils).
2. SPM Advisory Committee. A Site-based Participatory Management Advisory Committee (SPMAC), including representatives from each constituent organization, will advocate and advise on matters relating to site-based participatory management.
 3. SPM Facilitator. A site-based participatory management facilitator will support and facilitate the work of SPMAC and provide leadership for implementing site-based participatory management in MCPS.
 4. SPM expansion. In consultation with SPMAC, the superintendent will:
 - a. Develop a long-range plan for expanding the adoption of site-based participatory management in MCPS schools and provide for training and technical assistance for SPM units
 - b. Actively encourage schools to apply to participate in SPM
 5. Training and leadership development. Each year, the superintendent, in consultation with SPMAC, will assure that:

- a. Information, orientation and training about the concepts and processes of site-based participatory management are provided to all constituencies and to area and central office staffs
 - b. Ongoing training opportunities are provided for staff and parents in units that have adopted SPM
 - c. Administrator training programs provide opportunities to understand, prepare for, and support SPM
6. Application. A unit must apply and be selected to participate in SPM.
7. SPM requirements. While SPM encourages innovation and flexibility, units should implement SPM as described in this policy and must:
- a. Strive to improve educational opportunities for all students
 - b. Observe all pertinent federal, state, and local laws, policies, and regulations, and all collective bargaining agreements
 - c. Request waivers to Board policy, if necessary.
 - (1) Waivers to Board policy apply only to the site requesting the waiver.
 - (2) A process will be established under which contract waivers can be granted and approved by MCPS and the affected organization that are parties to the agreement. The development of this process for requesting waivers will include MCPS and representatives of each constituency group.
 - d. Base accountability for site-based participatory management decisions on a process and set of commitments, policies, and practices that are designed to ensure that students receive quality instruction in a supportive learning environment.
 - (1) Accountability measures should provide ways to identify, diagnose, and change courses of action that are ineffective.
 - (2) Each site-based participatory management committee must establish a formal mechanism

for defining, determining, and using the measures for accountability at that site.

- (3) All members of a site-based participatory management committee must be held jointly accountable for any decisions made by the committee, and for making sure that decisions are made within the terms of this policy and other policies, applicable laws, and regulations. No attempt shall be made to hold any individual member of a site-based participatory management committee answerable or responsible for a committee decision.
 - (4) Members of a site-based participatory management committee represent a specific constituency, and remain accountable to their respective constituencies for their overall conduct as a member of the decision-making body.
 - (5) The site-based participatory management committee shall be responsible for frequent evaluations of procedures and decisions in light of both outcomes and process.
- e. Be permitted to participate in decisions that result in the allocation of resources; i.e., staffing, money, and time.
 - f. Not have access to confidential data on individual staff members. Issues related to the performance and/or behavior of individual students, staff, or parents will not be discussed or acted on by the committee.
 - g. Not address decisions requiring access to confidential information about students, staff, and parents.
 - h. Seek from all constituent groups and other community groups who have an interest in education an increased commitment to the school, a climate of collegiality.
 - i. Establish and use a structure that ensures consensus decision-making, which requires agreement of all members of the SPM committee.
 - j. Involve and consult with appropriate area and central office staff regarding proposed changes in curriculum or other systemwide procedures.

- k. Resolve, whenever possible, or avoid decisions that have a negative impact on other schools.

8. Withdrawal from SPM

- a. If SPM efforts in a local unit are unsuccessful, a majority of one or more constituencies may determine to withdraw from participation. The unit, after communicating its desire for withdrawal to the SPM facilitator, and following a review by SPMAC, shall lose its designation as a formal SPM unit.
- b. Site-based participatory management committees that operate or make decisions outside the parameters of this policy will be withdrawn from site-based participatory management.

D. DESIRED OUTCOMES

1. Success for every student
2. Cooperation and collegiality among staff and with parents and students
3. Increased local accountability
4. Greater decentralization of decision-making

E. IMPLEMENTATION STRATEGIES

1. The superintendent, in cooperation with SPMAC, will establish regulations as they are needed to implement this policy and will assign responsibility for monitoring and reporting progress in achieving the goals of this policy.
2. Regulations developed in support of this policy will be sent to the Board as items of information.

F. REVIEW AND REPORTING

1. An annual report will be made to the Board of Education on the progress of site-based participatory management.
2. This policy will be reviewed every three years in accordance with the Board of Education's policy review process.
3. As part of that review process, or in the event that any policy changes are otherwise proposed, the Board will invite each constituent organization to submit in

writing its views on proposed policy changes. The Board will discuss any recommendations for changing the policy with all constituent organizations and seek consensus on the proposed changes.

Board members had the following suggestions and questions about the proposed policy:

1. Ms. Gutierrez felt that if the committee meant to include worksites other than those affecting student learning they had to make some adjustments in the language of the policy.

2. In regard to the SPM Advisory Committee and facilitator, Mr. Ewing stated that it was not clear as to who decided on these individuals and how the committee was formed. He felt that this information should be in the policy rather than in the regulation. He also thought that the local committees should include representatives from other educationally-related organizations in their deliberations as appropriate. Mrs. Mary Ann Bowen explained that the language should be interpreted as "including but not limited to...."

3. Board members suggested that language changes needed to be made in #2 under Definitions because it was not clear as to whether they were talking about local committees or one central committee. Mrs. Fanconi thought that if they indicated that SPMAC was to advise "the superintendent" it would be clearer that this was a county-wide committee.

4. Board members asked about whether or not the SPM facilitator was in the FY 1993 Operating Budget and whether the position had to be added on June 10. Dr. Cheung asked that the superintendent consider having local facilitators or mentors at the site.

5. In regard to the section on expansion of SPM, Ms. Gutierrez pointed out that it was not clear as to who "actively encourages schools to apply to participate in SPM." She had this question on several of the sections - who was making the decisions. She also hoped that the committee would look at the application process because she found it very restrictive.

6. Mr. Ewing felt that the policy needed to have some criteria for application and also show who made the decision on selection of the schools.

7. Mrs. DiFonzo suggested that the committee share the policy with Ms. Carole Burger of Association Relations.

8. Mr. Ewing pointed out that under #7 SPM requirements, waivers to Board policy applied only to the site requesting the waiver; however, there was no statement that contract waivers applied only to the site requesting the waiver.

9. Mr. Ewing said that page 11 needed a statement on how local site-based participatory management committees were formed. He assumed that the same constituency groups constituted the local groups as did SPMAC. There were also groups that were not school-based that would have a different membership.

10. Board members asked whether there was any way to clarify the role of the members of the site-based committees vis-à-vis their respective constituencies.

11. Dr. Cheung called attention to the section that stated, "be permitted to participate in decisions that result in the allocation of resources, etc." In the section on definitions, they talked about "a restructuring of decision-making and authority" and about "participants working together cooperatively to develop and implement the school improvement management plan" and "determining goals." He wondered why the section on "allocation of resources" wasn't in the section under definitions.

12. Mrs. Brenneman asked staff to reword section C.7.h.

13. Ms. Gutierrez asked staff to look at C.7.g and perhaps adding "individual" in line with C.7.f which specified confidential data on individual staff members. Mrs. Fanconi suggested adding a statement about privacy laws.

14. Mrs. Brenneman suggested that they reword the section on withdrawal from SPM because the first sentence was not clear. She thought they might say "a majority within one or more constituencies." Mr. Ewing asked that they look at the word "unsuccessful" in C.8.a. Mrs. Fanconi felt that this entire section needed clarification.

15. Mrs. Fanconi did not understand why "Success for every student" was included under Desired Outcomes because it did not seem to fit with the other items under this heading. Mr. Ewing suggested rewriting the section to state:

"This policy is designed to increase participation, cooperation, and collegiality among staff, parents, and students -- is accomplished by a greater decentralization of decision-making -- is designed by placing decision-making at the local level -- also to increase local accountability -- it is further designed to ensure through that process that there is greater commitment to and understanding and ownership of the local mission -- and the result of that ought to be that student learning (Success for Every Student) is improved."

16. In regard to the policy as a whole, Mr. Ewing felt that some of the things that were proposed for inclusion in the regulations

should be in the policy. However, if the regulations developed for the policy did include all things now proposed, he thought the Board should review and approve the regulations.

17. Mrs. Brenneman asked for information on the cost of implementing this policy. For example, what impact would it have on staff development funds.

RESOLUTION NO. 385-92 Re: ENDORSEMENT OF THE CONCEPT OF SITE-BASED PARTICIPATORY MANAGEMENT

On motion of Mrs. Fanconi seconded by Ms. Gutierrez, the following resolution was adopted with Dr. Cheung, Mr. Ewing, Mrs. Fanconi, Ms. Gutierrez, and Mrs. Hobbs voting in the affirmative; Mrs. Brenneman and Mrs. DiFonzo abstaining:

Resolved, That the Board of Education endorse the concept of site-based participatory management and the basic thrust of the proposed policy.

Re: ADJOURNMENT

The president adjourned the meeting at 11:05 p.m.

PRESIDENT

SECRETARY

PLV:mlw