VISION

A high-quality education is the fundamental right of every child. All children will receive the respect, encouragement, and opportunities they need to build the knowledge, skills, and attitudes to be successful, contributing members of a global society.

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Overview

The Montgomery County Public Schools (MCPS), the 16th largest school district in the nation, has a long-standing and well-deserved reputation for excellence. The district has been recognized by external reviewers both for student performance and organizational processes. MCPS was one of five finalists for the Broad Prize for Urban Education in 2010, and the district was a 2010 award recipient of the Malcolm Baldrige National Quality Award for performance excellence. The district's student achievement scores show similar promise—the overall number of students performing at the Advanced and Proficient levels on the Maryland School Assessment (MSA) has increased from 2003 to 2011. As one example, on the Grade 3 Reading test, the number of students scoring Advanced and Proficient increased from 66.8% to 89.3% during this time, and on the Grade 3 Math test, performance improved from 75.5% to 88.9% of students meeting these benchmarks.\(^1\) From 2000 to 2010, the number of students taking Advanced Placement (AP) exams in the district more than tripled, as did the number of students earning a score of 3 or higher; in 2010, 21,419 MCPS students earned a 3 or higher on at least one AP exam.\(^2\) As a result of district performance and the recognition MCPS has received, it is fair to say that many school districts around the country look to the Montgomery County Public Schools when they consider new initiatives and next steps for improvement.

Still, there is room to grow. Twenty-four elementary and middle schools in Montgomery County—12% of the district's schools—have been identified for improvement by the Maryland State Department of Education; two middle schools have been designated at the priority stage as a result of failing to achieve Adequate Yearly Progress for three consecutive years.\(^3\) While the overall number of students performing at the Advanced and Proficient levels on the Maryland School Assessment has continued to increase, gaps remain between the performance of White and Asian students and that of African American and Hispanic students. On the Grade 3 MSA Reading test in 2011, while nearly 40% of White students and 38% of Asian students performed at the Advanced level, only approximately 11% of Hispanic students and fewer than 13% of African American students did. Similarly, while almost 90% of White and Asian students scored at the Advanced and Proficient levels on the Grade 8 MSA Math test, fewer than 60% of African American and Hispanic students reached this goal.\(^4\)

While striving to continue growth and initiate new improvement efforts, like other districts, localities, and states around the nation, MCPS is being asked to “do more with less.” Over the last four years, MCPS has suffered a $182 million reduction in the base operating budget while enrollment in the district’s schools has increased by 9,000 students over the same period of

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\(^2\) Data obtained from the 2010 Annual Report on Our Call to Action.

\(^3\) For further information on MCPS performance on the Maryland School Assessment and on Maryland’s Differentiated Accountability Pilot, please refer to the 2011 Maryland Report Card: [http://www.mdreportcard.org/SchoolsForImprovementOverview.aspx?bypPV=41:0.15:AAAA2.000000].

\(^4\) Data retrieved from the Maryland State Report card website, located at: [http://www.mdreportcard.org].
Need for a Transition Team

It was upon the request of the new superintendent of the Montgomery County Public Schools, Dr. Joshua P. Starr, that the Transition Team was formed and held its first meeting in June of 2011. Dr. Starr, who was previously the superintendent of schools in Stamford, Connecticut, from 2005–2011, assumed the superintendency of Montgomery County Public Schools on July 1, 2011. He formed the Transition Team with a deliberate theory of action to guide its work:

If a team of expert “insiders” and “outsiders” spend quality time reviewing the major components of the MCPS system—teaching and learning, operations, and culture/context—and if this team engages with important stakeholders, then the new superintendent will begin the school year with a solid understanding of both the successes and strengths of MCPS that can be built on and the major challenges that MCPS faces.

It was in response to Dr. Starr’s articulated theory of action, and with the goal of producing 1) a document that reflects what we have learned and 2) a plan for the remainder of the year to go deeper into issues that arose, that the Transition Team was initiated.

Summary of Findings

The Transition Team convened on June 16, 2011, and divided into three committees: Teaching and Learning, Culture and Context, and Operations. Each committee was led by an outside expert and included current and former MCPS staff among its members. Over the space of the three months dedicated to the transition process, the teams reviewed a voluminous amount of community, district, and state data; met with and listened to employees, parents, local governmental leaders, and community representatives; and deliberated on MCPS’s work in light of educational research and identified best practices. As a result of the timing of the team’s work during the summer months, team members did not have the opportunity to visit schools and observe classroom work. Therefore, while the identified needs and recommendations included in this report were triangulated by multiple data sources, this report offers only a snapshot of the district’s work. The Transition Team would like to advise the new superintendent to continue to gather data over the coming year, particularly during school site visits and the “Listen and Learn” community forums, to further corroborate the findings and recommendations included in this report.

Recommendations herein are presented under four identified topic areas for the “near term” (to be initiated during this academic school year) and the “long term” (to be initiated over the next two to three years). From the team’s recommendations, five broad themes emerged:

1. Differentiation within and among schools, classrooms, and students;
2. Communications and relationships with stakeholders;
3. Implementation of vision, mission, and policies in practice;
4. Design and delivery of professional development initiatives; and
5. Issues of race and equity.
Differentiation within and among schools, classrooms, and students

MCPS has worked to address the inconsistent performance among the district's schools for more than a decade. Today MCPS continues to differentiate support and performance expectations between and among schools. Yet the Transition Team found a stubborn persistence in the variability of achievement levels among schools in Montgomery County. This variation in performance was further broadened to include a perceived variation in access to needed resources and specialized programs in our conversations with members of the MCPS community.

In light of this finding, the Transition Team recommends that MCPS continue to recognize the need for differentiation between schools, while also sharpening the focus on needs for differentiation within schools. MCPS should consider how best to allocate resources and support in accordance with the individual needs of teachers and students at the classroom level. By examining the instructional core, the relationship between the teacher, the student, and the content, MCPS can most effectively determine which teacher(s) may need coaching or professional development to determine how best to meet a struggling student's need and discover which students might benefit most from a varied instructional program or from supplemental learning opportunities. To effectively address the continuing underachievement of certain schools and students, MCPS should differentiate the provision of essential supports and resources in order to meet the particular needs of each student, while continuing to differentiate support to principals and schools.

Communications and relationships with stakeholders

Internal and external stakeholders have high expectations not only for district performance, but also for transparency and communication of district processes. It is important that all stakeholders understand decision outcomes, how decisions are made, what processes are used for decision-making, and what opportunities they have to contribute to the decision-making process. Over the past few years, the district has increased the involvement of community members in the budget process, particularly through the creation of the Budget Review Group. The district has also increased involvement in the facility planning process through the establishment of boundary advisory committees, roundtable advisory committees, and annual forums. However, the Transition Team heard from stakeholders across the district that more work needs to be done to increase communication and subsequently build relationships with all parties.

As a result, the Transition Team recommends that the district seek to strengthen communication to and relationships with internal and external stakeholders in order to build more support for decisions that are made. The district has the opportunity to strengthen communication internally so that all representative groups, including central office staff, school-based administrators, teachers, support professionals, parents, students, and external partners, are invited to participate in the decision-making process. MCPS should also seek to improve its relationship with external stakeholders, particularly the County Council, through the establishment of ongoing and regular communication streams. Finally, the sheer size of Montgomery County mandates the implementation of creative ways of gathering and disseminating information. Dr. Starr has already initiated Listen and Learn forums across the district to ensure that all stakeholders are involved in the transition process. He has also sought to increase communication through the use of Twitter and other social media. To ensure the continual involvement and representation of school representatives and parents from across the county in decision processes, the Transition Team recommends that forums be held regularly during Dr. Starr's tenure at locations districtwide and that the district seek to establish communication with all stakeholders through the use of technology and other creative means.

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Implementation of vision, mission, and policies in practice

MCPS has demonstrated its desire and ability to do and succeed at many things at once. The number of policies and frameworks in place to guide the district's work in a multitude of areas serves as an indication of the number of initiatives that have been implemented in MCPS. These vision, mission, and policy statements include the School Climate Compact, Organizational Culture of Respect, the Equity Framework, and the Call to Action, to name a few. Despite the clear articulation of goals communicated through these documents, gaps became apparent when examining the recorded ways of respecting and working with each other and the actual conditions that MCPS stakeholders and employees described as their experience. Furthermore, the Transition Team was repeatedly informed that the district had so many initiatives under way that some members of the MCPS community were overwhelmed by the totality of the reform process.

The Transition Team recommends that MCPS consider how to effectively align the district's articulated plan of action, as described in vision and mission documents, and the district's actual actions as they are implemented in schools and offices across the district. Additionally, the Transition Team recommends a review and prioritization of the large number of initiatives through which MCPS is currently pursuing reform. The volume of improvement efforts contributes to a perceived lack of coherence across district initiatives and makes it difficult to discern the impact of many of the district's ongoing efforts to improve student achievement. As articulated by stakeholders, the district must “make some choices” and improve its follow-through, or accountability, on district initiatives to ensure that priority efforts are implemented, revised as needed, and ultimately successful.

Design and delivery of professional development initiatives

No topic emerged more frequently in conversations with stakeholders during the Transition Team's data-gathering process than professional development. Concerns about accountability for implementing skills and pedagogies learned in professional development, access to professional development for all teachers and support professionals (particularly in regard to technology), and the need for specific professional development by teachers and administrators to foster their own continued growth were all expressed. Particular anxiety was voiced regarding the district's proposed plan to move to an online model of professional development to facilitate cost savings. Furthermore, the bifurcation of the professional development functions of the district for organizational reasons raises additional concerns.

The Transition Team recommends that MCPS consider reorganizing the design and delivery of professional development as employee and organizational needs are identified and as new skills are required for growth and new leadership. If the new theory of action of MCPS is to be focused on the improvement of the instructional core, with an underpinning of equity and excellence and the distribution of resources according to student need, the Transition Team recommends that professional development be reorganized and updated to a 21st century focus on ongoing, systemwide professional learning to reflect that purpose. A districtwide professional learning plan should include a clear vision with intended outcomes.
for school and district administrators, teachers, and support professionals; a coherent, aligned, and effective plan to meet the needs of MCPS employees as tied to district and school improvement; and a clear system of accountability for implementation, feedback, and revision in an ongoing cycle. Moreover, this transition is an excellent opportunity for MCPS to establish a program of ongoing professional learning aligned to a model of continuing growth for all MCPS employees and aligned to national standards.

Issues of race and equity

MCPS has articulated a commitment to equity and excellence. The district has successfully initiated a conversation on the impact that a child's race has historically had on his/her access to high-quality educational opportunities and the support needed to achieve academic success, as illustrated by the Equity Framework. However, as expressed by stakeholders, race, class, language proficiency, and geographic factors continue to affect students' access to certain programs and parents' abilities to participate in their children's education. Access to special programs and resources across the district concerns both the parents of high-achieving and struggling students, raising the question as to how the equitable allocation of resources is being determined and assessed in the Montgomery County Public Schools.

The Transition Team recommends that MCPS develop an enduring, systemic approach to sustaining the district's commitment to address issues of race and equity to ensure the academic success of all MCPS students. In doing so, the district must consider how to maintain a focus on race and equity by embedding it within other initiatives as opposed to isolating this critical topic as a stand-alone project. The district has already identified instructional practices and observable teacher behaviors that communicate high expectations and support the achievement of all students. These research-based practices must be used in all classrooms and embedded across curricula. Finally, the Team recommends an examination of the district's current practice of allocating resources to students and schools to ensure that funds are equitably distributed to provide all students, in all schools, with the resources necessary to achieve success.

The Transition Team hopes that providing these themes will assist the reader in examining the Transition Team's report and in offering advice to Superintendent Starr as he “listens and learns” across the district. In order to achieve the goal of supporting all MCPS students to reach the highest levels of performance, the Team has produced the following series of goals for Superintendent Starr to consider as he and the MCPS community chart their future course together.
The Teaching and Learning committee was charged with the task of determining the current status of MCPS efforts to ensure that all students have access to a high-quality instructional environment that prepares them for college and the world of work. It must be noted that teaching and learning is much too large and too complex for one committee to provide an in-depth analysis of all issues facing the district. The charge given to this committee was particularly challenging due to the timing of the Team's work during the summer months. As a result, this report was developed without the benefit of interacting with teachers and students in schools and classrooms. Instead, this committee reviewed documents, conducted interviews, and held focus groups to gather and provide input about areas in need of attention by the new superintendent as he plans his initial work. Clearly, further examination must be conducted to determine a full and comprehensive understanding of the status of teaching and learning in MCPS.

The accomplishments of the district in the area of teaching and learning are well-known and well-documented. Yet, stakeholders were also open in their acknowledgment of the challenges facing the county. From the Teaching and Learning committee's work, three broad themes emerged. While these themes do not necessarily call attention to new issues, they do represent areas of work in need of continuous improvement. These priority areas are:

1. Variability of performance among schools and underperforming schools;
2. Alignment of district organization to support schools and classrooms; and
3. Implementing rigorous curriculum in a large and diverse school system.

### Variability of performance among schools and underperforming schools

**Key Successes**

MCPS publicizes a wealth of information on student performance results in *Our Call to Action: Pursuit of Excellence* (to be referred to as “Our Call to Action”), the Annual Report, and online. *Our Call to Action*, the district’s strategic plan, establishes clear benchmark goals to demonstrate district progress and achievement. All selected data points are compared to state standards when those standards exist. For data points for which there are no state standards, local standards or targets have been established, an indication of MCPS’s commitment to succeed in all areas regardless of state requirements. And the identification of the Seven Keys to College Readiness provides a trajectory of advanced performance targets throughout the K-12 experience to raise the bar for all schools and students.

Overall, student achievement results in Montgomery County are impressive. For example, in 2010, the district had a 90% graduation rate. In addition, 66.1% of the Class of 2010 took at least one AP exam during their school career, and 50% scored well enough to earn college credit.6 Thirty-four of the district’s schools have been designated as
National Blue Ribbon schools for high performance or demonstrated improvements in student achievement. Across the district, initiatives focusing on early childhood have produced strong reading performance. However, MCPS has also recognized that variability in school performance exists and has taken steps to begin to address the needs of schools identified for school improvement under NCLB. For example, Achievement Steering Committees provide additional central office support to schools in Year 2 of School Improvement, Corrective Action, and Restructuring Planning.

**Primary Challenges**

While overall student achievement is strong, persistent gaps remain between the performance of White and Asian students and that of African American and Hispanic students. Disparities in outcomes also exist between special education students, students of limited English proficiency, and economically disadvantaged students. As one example, while the number of all MCPS students scoring in the Advanced category on the Middle School Reading Maryland School Assessment (MSA) has increased from 38% in 2003 to 57% in 2011, a gap of nearly 40 percentage points separates the performance of African American and Hispanic students and their Asian and White counterparts on the Grade 8 Reading MSA in 2011.\(^7\)

Variability also exists in the representation of student subgroups in certain MCPS programs. Among students identified as gifted and talented, African American and Hispanic students continue to be underrepresented, while White and Asian American students continue to be overrepresented. For example, according to 2010 Grade 2 data reported in the district’s Annual Report, while nearly 50% of White students who were screened were identified for gifted programming, only 13.4% of African American students and 12.3% of Hispanic students were identified for these services; identification numbers were similar in 2008 and 2009 as well. On the contrary, in special education programs, African American and Hispanic students are overrepresented. The SIPPI (Student Instructional Program Planning and Implementation) process was piloted from 2009–2011 in 31 schools with the purpose of using consistent methods to identify, document, and recommend students for accelerated instructional opportunities, but full elementary implementation of the model was delayed until the spring of 2012.

In addition to variability of performance among student subgroups, variability is also evident in school performance in similarly situated schools throughout the district. Although the district appears to have the structure and processes in place to address variability, i.e., Professional Growth Systems, well-defined standards-based curriculum and assessments, a continuum of interventions for students at risk, and readily available school performance data, variability in school performance continues to exist. The district should continue to be alert and responsive to schools whose performance is significantly below that of most schools in the district and below comparative schools in the district. In the 2011–2012 school year, two middle schools are entering Restructuring Planning and two middle schools and one elementary school are entering Corrective Action for failing to achieve Adequate Yearly Progress. Addressing the needs of these schools will demand considerable coordination of systemwide resources directed toward classrooms, teachers, and students.

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RECOMMENDATIONS FOR DR. STARR:

Near-Term Goals

• **Implement more focused intervention actions when schools fail to meet district targets.** First, focus on the few schools that need the most intensive support. Then identify a single leader to align resources and to report ongoing progress directly to the superintendent. By coordinating district efforts into a single, laser-focused plan, struggling schools will be less likely to feel overloaded while seeking to make improvements. The superintendent should provide clear direction to staff to operate as a coordinated support team rather than as individual supports.

• **Address issues of under- and overrepresentation in specific programs.** It is possible that further implementation of SIPPI across additional schools and grades may indicate the system's ability to successfully address the underrepresentation of disadvantaged students in gifted and talented programming. A full evaluation of the pilot's impact should be examined, and additional methods by which issues of under- and overrepresentation can be addressed should be considered. MCPS's stated commitment to equity is challenged by the ongoing realities of under- and overrepresentation, and confronting these issues offers a leadership opportunity for the new superintendent.

Long-Term Goals

• **Align resources to create flexible staffing assignments designed to support school “turn about.”** Individuals selected for these roles in leading improvement should have proven track records in moving challenging schools. Instructional generalists do not necessarily have expertise in the needs and demands of an underperforming school. Most importantly, this effort must have a clear leader to ensure a coordinated response.

• **Analyze performance patterns of both high- and underperforming schools,** particularly of schools serving similar populations. Identify patterns and practices that differentiate the two groups, such as staff experience, equitable practices, and mobility. Analyzing results may lead MCPS to raise additional questions about performance that could, in turn, uncover the root causes of those results.

• **Benchmark successful schools within MCPS and across the state.** There are many excellent, high-achieving schools beyond MCPS serving wide-ranging communities. By exploring patterns of success in other schools across the state, district staff might gather new recommendations to bring to MCPS. These recommendations could be used to coach and support underperforming schools.

• **Examine variance in performance across schools by student subgroup,** particularly variance in performance among special education and limited English proficiency students. Schools may have varying degrees of ownership and success with these student groups, but meeting the needs of all student populations is critical to achieving MCPS's mission and ongoing success. Comparability data can also help identify where school programs are working well and where they require intervention.

Alignment of district organization to support schools and classrooms

**Key Successes**

MCPS was recently recognized with two national awards. In 2010, the district was granted the Malcolm Baldrige National Quality Award and was named a finalist for the Broad Prize for Urban Education. These external recognitions are likely due, at least in part, to the systems that have been established to align the district organization to support schools and classrooms. As a few examples, Enhanced School Improvement Teams support schools in need of improvement; the Office of School Performance Monitoring Protocol provides consistent monthly guidance to leaders within the district; templates have been developed to assist school leadership teams in assessing their status on meeting the Seven Keys; and the M-Stat process serves as a forum for data-driven decision-making.
Primary Challenges

Despite the district’s external affirmation of quality, silos still affect progress within MCPS in the area of teaching and learning. MCPS has a rich array of district-level resources that sometimes work independently and do not maximize opportunities to align resources vertically (central office to classroom) or horizontally (across district office departments and units). Another inhibitor of alignment cited was a lack of direct control of resources, since key functions for supporting teaching and learning (such as setting school staffing levels) are not located within the Office of the Deputy Superintendent. Furthermore, in some cases, bureaucratic processes make it challenging for central office staff to provide needed support to schools. For example, instructional support specialists in the Office of Curriculum and Instructional Programs provide support directly to schools. These specialists are two personnel layers removed from the associate superintendent, who is expected to coordinate with the community superintendent, who is ultimately held accountable for the school’s performance. The degree of separation between the instructional support specialists and the community superintendent, and the need to coordinate and align supports provided, results in some unnecessary inefficiencies in the process of assessing and providing support to schools.

Additionally, at times, stakeholders indicated that community superintendents and district offices contradicted one another in providing directives to schools, and separate district offices guided the implementation of district initiatives in contrasting ways. Considering the reported lack of consistent communication, it is not surprising that both school and district administrators candidly expressed their concern of often being “out of the loop.” One specific example repeatedly cited was the development of different predictor models for determining student placement in mathematics. One model was produced by the Office of Shared Accountability (OSA), while a different model was given to schools from the Office of the Chief Technology Officer (OCTO), and both were presented to school staff as the way things should be done. While excellent processes require an appropriate level of funding and staffing, the establishment of clear alignment and organizational structures to ensure coherence and to convey a consistent message is critical in a large organization.

The sometimes blurred alignment of organizational processes in areas cited has caused entrepreneurial building principals to fight for and secure their own access to support services. Unfortunately, many acknowledged that the district’s insufficient organizational alignment particularly affects struggling schools that most need clear and coherent support. Furthermore, this year, four of six community superintendents, housed in the Office of School Performance, will be new to their positions. New individuals will need mentoring and guidance to successfully manage the broad scope of responsibilities associated with the job and to promote consistency in structures and processes across all clusters. The selection of four new community superintendents provides Dr. Starr with the opportunity to examine the role and assignment of community superintendents and foster the development of new relationships between and among the superintendent, community superintendents, schools, and district offices.
RECOMMENDATIONS FOR DR. STARR:

Near-Term Goals

• **Seek input from school and district leadership on improving alignment and fostering teamwork.** By engaging in regular team-building conversations with top district leaders, a learning community that fosters continual improvement can be fostered. In addition, school leaders need to be involved in an analysis of how best to deliver services to schools and supports to teachers. Finally, all leaders in the district need to be involved in determining how best to improve communication among school and district administrators so as to keep everyone informed.

• **Empower leaders to make decisions.** Quality assurance is always difficult in a large organization. Establish clear decision-making processes so that if an individual leader does not have the authority to make a decision, the next leader “up the line” should be able to make it. Empowerment of leaders at multiple layers will allow decisions to be made as close to the situation as possible.

Long-Term Goals

• **Establish distinct systems and expectations for collaboration at the district level.** Support horizontal and vertical alignment across the central office to end the practice of decision-making and working in silos. Seek to establish coordination among academic, special education, ELL, and gifted departments. Furthermore, the Elementary Integrated Curriculum (EIC) team, charged with developing Curriculum 2.0, is assigned to one department, Enriched and Innovative Programs, but the Curriculum 2.0 project will result in the overhaul of the elementary curriculum, thereby also affecting the work of other offices within the Office of Curriculum and Instructional Programs. A well-articulated collaborative reform effort among departments may be most likely to produce the intended outcome of a well-written and effectively implemented curriculum.

• **Revisit the resource allocation process** in light of the work that must be done to support schools. Those who are accountable for delivering services need to be responsible for determining how resources are allocated and aligned. As priorities and projects change, teams should be restructured to produce deliverables and problem solve. Support systems for schools must be aligned to provide principals, teachers, and site-based staff with the just-in-time assistance required to improve academic success.

• **Clarify the role of central office as a service unit to support schools.** Establish a system of reciprocal accountability between central office and schools to ensure that central office provides needed resources and services to schools, and schools, in turn, work to achieve improvement goals. Central office departments should provide and deliver diversified resources on a just-in-time basis to support schools. If the expectation of providing service to schools when needed cannot be met, or if certain services are unneeded by schools, determine whether this specific central office unit is still essential, and if not, realign job responsibilities to provide support where it is required.

• **Seek to balance leadership workloads among job-alike leaders** or recognize the differences with needed supports. The levels of responsibility among job-alike leaders vary tremendously in MCPS. While there are no easy leadership jobs in MCPS, some assignments are much more challenging than others. If one leader bears the burden of addressing multiple challenging situations, provide this leader with additional supports, resources, and recognition.

Implementing rigorous curriculum in a large and diverse school system

**Key Successes**

MCPS has been recognized for its wealth of talent in the areas of curriculum development and instructional programs. Many staff members have earned reputations in their content areas at the state and national level and now provide leadership in their areas of expertise both within and beyond MCPS. The $5 million award the district recently received to develop the Elementary Integrated Curriculum, also
known as Curriculum 2.0, is one example of the recognition MCPS has received. This grant from the U.S. Department of Education includes a partnership with Pearson to help develop assessments for the project as well as expand opportunities for online professional development.

The K-12 Mathematics Work Group is another example of continuous improvement in the area of curriculum development. The group was convened to examine the effects of mathematics reforms and initiatives put into place in the past decade. District-level staff, school-based staff, parents, and leaders of employee organizations comprised the work group, and outside expertise was sought from additional experts and stakeholders as well. The final report effectively outlined the district’s accomplishments in the area of mathematics and provided recommendations to address the issues and challenges of implementing rigorous mathematics instruction.

**Primary Challenges**

Designing and implementing curricula across a district as large and diverse as MCPS is a challenge. As one high-quality lesson plan may not work successfully for all students in a classroom, one written curriculum may not be equally effective in every school and classroom. This reality was acknowledged in the recommendations of the K-12 Mathematics Work Group report, as the work group called for more depth of content and capacity to differentiate instruction. The work group identified the need to enhance the rigor of the curriculum at each grade level for all students while also challenging the practice of accelerating large numbers of students by skipping grades. Concerns with the district’s ability to effectively implement Curriculum 2.0 for grades K-2 while writing the curriculum for grades 3-5 this coming year were also expressed.

Staff described their work as being similar to building a plane in flight. Although the grant and the partnership with Pearson have been beneficial in bringing additional expertise and resources to MCPS, there are also challenges, as the workload for Curriculum 2.0 design and implementation for the coming year leaves few resources for meeting other school needs.

At the school level, there are clear expectations for principals to be curriculum experts but few clear support systems through which they can gain this needed expertise. While principals recognize that they are responsible for implementation of new programs, they frequently feel that they receive inadequate preparation to carry out that responsibility. They would benefit from more specificity and depth of understanding beyond lists of “look fors.” Similarly, the identification of supports and resources for principals in curricular implementation is needed. One document reviewed, entitled “EIC Implementation Protocol,” outlined the role of the principal, teachers, and students in implementing Curriculum 2.0, with areas of responsibility and actions. However, community superintendents and district instructional leadership staff were not included on this document with assigned roles and responsibilities. School principals must be aware of who they can contact for assistance. Furthermore, district leaders should share ownership with school leaders for the effective implementation of curriculum.
RECOMMENDATIONS FOR DR. STARR:

Near-Term Goals

- **Establish a clear action plan for implementing the recommendations of the K-12 Mathematics Work Group.** While a detailed plan to plan may be needed for district staff that carries out the recommendations of the work group, a simple set of actions needs to be communicated to schools if changes are going to be made. Furthermore, since full implementation will not occur for a number of years, a plan to address mathematics instruction for students currently in grades 3-8 should also be articulated.

- **Revisit the timeline and implementation plan for Curriculum 2.0.** The deliverables for Curriculum 2.0 are extremely ambitious. The changes coming from the state of Maryland’s adoption of the Common Core State Standards (CCSS) must be incorporated carefully as part of this reform. As important as the conditions of the grant and the partnership may be, more important is to assure that Curriculum 2.0 will meet the needs of MCPS schools and students. This effort is too critical to be rushed. The decision to continue the implementation should be based on feedback from teachers and principals on this year’s first phase. If the determination is made that the timeline and the implementation plan are appropriate, then enhanced communication to schools is essential, including clarification of district roles and responsibilities.

Long-Term Goal

- **Focus on providing effective training support for teachers.** In a district as large at MCPS, the personnel that would be required to train teachers to implement new curricula in a traditional in-service model would be prohibitive. Through some central reorganization, instructional support staff was brought closer to content development. The next step is for these staff to become experts in the content for which they will provide professional development. Training certification processes are used in business settings and with compliance trainings. Use of a model that awards teachers with certification of readiness to implement the curriculum could also work for teaching and learning.
Professional Learning

While no one committee of the Transition Team was specifically dedicated to assessing the status of professional learning in MCPS, this topic emerged in nearly every focus group session held as part of the Team’s work and in conversations across the Transition Team committees. The prominence with which the topic emerged in the Transition Team conversations suggested that professional development should occupy its own section of the report.

The Montgomery County Public Schools has been widely recognized for its unique staff development initiatives and its professional growth systems. Over the past few years, however, budget cuts and organizational changes have threatened to dismantle the district’s dedicated work to be at the forefront of professional learning initiatives. MCPS must consider both the impact of recent cuts on the district’s professional development staff, the potential benefits and drawbacks of supporting increased online learning opportunities, and the most appropriate location in the organization for the coordination and design of professional development initiatives for administrators, teachers, and staff. Across the Transition Team committees, two focus areas emerged as related to professional development:

1. Supporting professional growth systems and
2. Ongoing professional learning for teachers, leaders, and staff.

Supporting professional growth systems

Key Successes

MCPS has established a comprehensive approach to professional growth and to building the capacity of all MCPS employees. This continuum begins during the recruitment and hiring processes and continues until an employee retires or ends employment with MCPS. Over the past decade, the district has developed and implemented three successful professional growth systems for teachers, principals and administrators, and supporting services staff. The Teachers’ Professional Growth System (TPGS) includes a collaborative approach to addressing performance issues when necessary, providing additional support for improvement, and recommending further action when the support does not lead to necessary improvements in performance. The program has led to the resignation, retirement, or removal of more than 500 underperforming teachers. The TPGS was also noted by many for the transparency and fairness of its Peer Assistance and Review (PAR) process, which has won national recognition and been the subject of study by many states and countries. MCPS’s ability to recruit and train consulting teachers for the PAR system has provided leadership opportunities for teachers and increased capacity within its workforce as well. Also positively noted within the TPGS is the fidelity of the observation and evaluation process, which has led to the adoption and implementation of a common language of teaching and learning.
Specific systems have been established to prepare new teachers and leaders to be successful professionals in MCPS. The district has implemented a new onboarding course that is a required activity for all new employees. All teachers hired by MCPS since 2003 must take the Studying Skillful Teaching course; 6,467 teachers have taken the Studying Skillful Teaching 1 course, and 1,947 have taken the Studying Skillful Teaching 2 course. Additionally, MCPS fully supports the National Board Certification and Development Program, and 584 teachers have this certification, the largest number in the state of Maryland. Finally, a principal development program has been established to offer training to those who aspire to be an administrator. Ninety percent of MCPS principals have assumed leadership roles as a result of their preparation through this leadership program.

**Primary Challenges**

Maintaining the integrity of the district’s professional growth systems will be a challenge in MCPS. First, as a result of Maryland’s Race to the Top grant, MCPS will be expected to meet the state’s new requirements for educator evaluation systems and align its standards with the Common Core. Second, inconsistencies within the district have resulted in support for new teachers not being uniform. Even while mentor teachers provide some support to new and nontenured teachers, it is difficult for administrators to provide the additional coaching and supervision needed if they have a disproportion of nontenured teachers. And in the same way that some schools have more new teachers than others, some schools have new principals with little experience facilitating teacher growth. In all cases, the multifaceted role of the principal can make it difficult for principals to stay fully versed in curriculum and pedagogy as well as fully engaged in providing high-quality feedback to teachers as their primary responsibility. Moreover, funding the PGS Career Lattice will be an ongoing challenge. In spite of these challenges, MCPS must strive to continue to align the three professional growth systems to ensure consistency while continuing to address the needs of each system.

While many stakeholders articulated the strengths and accomplishments of the system that had been developed for teachers, few were able to comment on systems in place for administrators and support staff. Specifically, stakeholders identified the challenges of maintaining expectations for administrators and supporting the performance of high-quality administrators throughout the district, calling attention to variability in principals’ abilities, leadership skills, and in the supports that school leaders receive from central office. Different leadership styles and abilities result in significant cultural differences between schools and varying rates of turnover in staff across the district. As is currently practiced with TPGS, struggling administrators in need of support must be assigned to and receive support from consulting administrators to foster improvement. Stakeholders requested that central office staff spend more time supporting, coaching, and evaluating school leaders. Central office staff expressed their concerns that there are more schools in need of support than there are hands to meet these needs.

**Recommendations for Dr. Starr:**

**Near-Term Goals**

- **Maintain, improve, and utilize the Professional Growth Systems (PGS).** Thoroughly review all components of the PGS with community superintendents and directors of school performance. Establish more consistent and collaborative relationships with the
Department of Professional Growth Systems and the Office of School Performance to ensure that the PGS is effectively used by all school-based administrators.

- **Utilize the PGS to effectively support, supervise, and evaluate principals.** MCPS values professional growth and development for all of its staff members. The district would benefit from identifying areas of all existing professional growth systems that could benefit from being strengthened. Professional growth systems for administrators and support staff are in need of further development, refinement, and consistency.

**Long-Term Goals**

- **Analyze the effect of the PGS on student achievement by teacher.** Data can be analyzed to determine if teachers who receive consulting teacher support as novices have an impact on student achievement in comparison to other teachers. Findings would provide data for the continuous improvement of the system as well as potential justification for the associated expenses. The student success data should be linked with various capacity-building efforts, such as teachers who complete Studying Skillful Teaching courses with a high degree of success, as well as benchmarked against state and national data.

- **Determine how to achieve state compliance within the MCPS PGS system.** A plan must be developed to meet the state's requirements for educator effectiveness while maintaining the integrity of the professional growth systems for teachers and principals. Additionally, MCPS professional standards must be aligned with the Common Core standards.

**Ongoing professional learning for leaders, teachers, and staff**

**Key Successes**

MCPS invests much time and money in building staff capacity through the provision of professional learning opportunities. Extensive training has been offered to paraeducators throughout the school year and to all 10-month supporting services employees on weekdays during the school year when school is not in session. MCPS also has an extensive tuition reimbursement program, and in FY 2011, 4,675 staff benefited from this program.

Specific training institutes and staff in MCPS are dedicated to the purpose of providing high-quality professional development (PD). For instance, the Professional Learning Community Institute builds the capacity of school leadership teams and has worked with 71 schools since 2005. The School Leadership Team Institute offers school leadership teams the opportunity to participate in high-quality professional development and empowerment. The district recently provided professional development to teachers from more than 60 schools to strengthen their technological, pedagogical, and content knowledge. Core teams from schools are receiving PD to prepare them to implement and to train others at their sites on the new Curriculum 2.0. Most importantly, MCPS is widely recognized for its provision of ongoing, job-embedded professional development and support through the provision of a staff development teacher allocated to each school.

**Primary Challenges**

Feedback from stakeholders revealed that there is a quality professional development system that is not being maximized for teachers, administrators, and support staff engaged in teaching and learning. Staff development teachers have developed sophisticated skills and receive training that gets reinforced every year. Yet, as the result of three years of reductions, 18 of 131 elementary schools in the district now have a 0.5 staff development teacher. Similarly, all MCPS middle and high schools that are not part of middle school reform have a 0.4 staff development teacher. In total, about 25% of the staff development positions have been reduced over the last three years as the result of budget cuts. Many of these instructional specialists now must also balance teaching responsibilities with the provision of coaching and support to
other teachers and with leading schoolwide PD. Amidst cuts to staff developers’ time, MCPS is seeking to
decrease on-the-ground PD sessions and increase online PD opportunities for staff, which, as expressed in
focus groups, has raised significant concerns.

Additionally, stakeholders commented that there is a lack of data demonstrating the outcomes of district-
wide professional development initiatives. The degree to which teachers, paraeducators, and administra-
tors are held accountable to implement skills learned in PD was also questioned. The district’s compre-
hensive professional development plan stipulates that MCPS collect learning data based on professional
development sessions held. However, in most cases, data has not been collected on the degree to which
skills learned in PD are being utilized in the classroom or the degree to which they are impacting student
learning. A school’s PD plan needs to align with its school improvement plan.

It is also critical that the district address the reality that professional learning initiatives are currently
housed in two separate locations in the district—under both the Office of the Deputy Superintendent
of Schools and the Office of the Chief Operating Officer. For almost a decade, all professional develop-
ment was under singular leadership in the Office of Organizational Development. Last year, the decision
was made to distribute professional development units where they would be more closely aligned to the
content specialties for which they provided training. Leadership development was moved to Human
Resources; instructional support to the Office of Curriculum and Instructional Programs (OCIP); and
technology to the Office of the Chief Technology Officer (OCTO). The separation of professional growth
and professional development systems across the district, and in many cases, farther away from the focus
of teaching and learning, will likely have implications for the effectiveness of these systems and an unin-
tended impact on classrooms.

**RECOMMENDATIONS FOR DR. STARR:**

**Near-Term Goals**

- **Establish a focus on ongoing professional learning for all.** The district’s current focus on a variety
  of separate and distinct professional development initiatives causes further division among learning
  opportunities and their potential impact on school improvement. By prioritizing ongoing, school-based
  professional learning opportunities for staff, teachers will have the opportunity to apply, assess, and
  continually improve their pedagogy. Similar opportunities for administrators and paraeducators should
  also be prioritized.

- **Assess the impact of staff development teacher reductions.** Over the last two years, the time that
  staff development teachers at the elementary and secondary levels have to coach teachers and provide
  PD has been increasingly reduced. It is critical for MCPS to evaluate the impact of these reductions on
  teacher effectiveness and satisfaction. The findings should be used to influence the superintendent’s
decision to maintain the positions’ current status or to restore time allotments and accompanying
responsibilities in the next budget cycle.

- **Evaluate the potential impact of using technological resources to deploy professional
development.** In times of dwindling resources, there is a clear need to maximize the use of current
resources. However, prior to transitioning to online PD systems, assess when and how technology is
appropriate as a tool for professional development. There may be certain venues for which an online
medium can increase collaboration across schools, such as by establishing virtual professional learning
communities for instructors of specialty courses like art, music, and Advanced Placement classes.
In other cases, such as when teachers seek to learn new pedagogies to implement in the classroom,
on-ground PD sessions may best be preserved.
Long-Term Goals

- **Align professional development initiatives with school improvement plans.** Improved data collection efforts on the outcome of professional learning will lead school administrators and central office staff to best determine appropriate and needed opportunities for professional learning at each school site. By assessing needs for improvement, selecting focus areas for improvement by school, and aligning professional development to meet these needs, school staff can collectively benefit, schools can focus on improving one to two areas of need at a time, and the impact of the PD can be accurately evaluated.

- **Examine the impact of the bifurcation of professional development** and the absorption of the Office of Organizational Development (OOD) under two separate offices. Determine the degree to which this division is working from the perspective of service providers and service recipients. Assess whether professional development initiatives are having the intended impact on improved student learning under the new organizational structure. Based on the results, consider reuniting the arms of the district’s professional development initiatives.

- **Measure the outcomes of professional development.** MCPS has an impressive array of professional development approaches and strategies that comprise a portfolio of supports that the district provides to staff. Yet, there is a need to more explicitly evaluate the effectiveness of professional development programs with a greater focus on measuring the rates of implementation, related outcomes, and results of training. Results should then be used to make decisions for continuation and expansion of programs and to prioritize PD investments.

- **Establish partnerships with universities.** Numerous stakeholders articulated their desire to have access to courses offered through online university programs. Additionally, MCPS staff suggested that universities could assist the district in providing PD to administrators and staff and in evaluating the impact of professional learning initiatives during a time of increasing budget shortfalls.
Culture and Context

“Educational equity and excellence are the foundations of the MCPS culture and are highly valued by the Montgomery County community.”

The Culture and Context committee was tasked with understanding the dynamics within MCPS communities that contribute to, or detract from, the system’s efforts to ensure all students have access to a high-quality instructional environment. The team considered the district context as it relates to internal and external factors that impact the school district’s organizational climate and culture and influence the key purposes and work of the school district. In order to assess the values, beliefs, expectations, guiding principles, relationships, and norms of the district, the Culture and Context committee conducted interviews and analyzed existing survey data, documents, policies, and practices. The system’s aspirations were compared to those espoused in the Organizational Culture of Respect; the School Climate Compact; Our Call to Action: Pursuit of Excellence; the Application for the 2010 Malcolm Baldrige National Quality Award; the Leadership Profile Report prepared by Hazard, Young, Attea & Associates; the Framework for Equity and Excellence, and numerous other district-generated documents. The team rigorously inquired about the relationship among the many profound statements that describe the espoused culture and tested these statements to determine the extent to which the “espoused values” compare with the “actual values” that exist at all levels of the system.

Overall, there are many significant accomplishments that have contributed to informing the development of core documents that define system aspirations for the values, beliefs, norms, and expectations important to the organizational culture of MCPS. Through multiple collaborative efforts, the district has made it clear that all MCPS stakeholders are responsible for maintaining and sustaining the espoused values embedded in the district’s core aspirational documents. The MCPS reality, however, indicates there are considerable challenges ahead to fulfill the promise of the espoused organizational values and beliefs. The team recognizes that defining, maintaining, and sustaining the MCPS organizational culture is work that is without an end. Culture and context are perpetually shaped by dynamic changes in political, economic, demographic, cultural, and social conditions. The continuing work of the district must include being proactive, intentional, and focused on building capacity; “onboarding” new employees; orienting students; refreshing relationships; and establishing accountability for all employees regardless of position or hierarchy. Three priority areas in need of ongoing improvement emerged from the Culture and Context committee’s work for the superintendent to consider and respond to in the near and long term:

1. Ongoing commitment to equity and excellence;
2. Enhancing a culture of respect and communication; and
3. Community engagement, advocacy, and interest groups.

Ongoing commitment to equity and excellence

Key Successes

MCPS is distinctive in its expressed commitment to equity and excellence. MCPS is among a small number of school districts in the United States that has opened the discussion to consider the particular
impact race has historically had on a child's access to high-quality educational opportunities and the support needed to achieve academic success. MCPS has also demonstrated moral courage by providing opportunities in which difficult conversations around race and equity can occur, resulting in a widespread belief across the district to eliminate race as a factor used to predict, or determine, the success of students in MCPS. The district's commitment to equity is made explicit in the core values articulated in Our Call to Action and reaffirmed annually. The following three core values provide important guidance for policy and practice:

- MCPS is committed to doing whatever it takes to ensure that every child, regardless of race, ethnicity, gender, socioeconomic status, language proficiency, or disability, learns and succeeds.
- Student outcomes shall not be predictable by race or ethnicity.
- MCPS has high expectations for all students, believing that all children can learn at high levels.

The 2010 application for the Malcolm Baldrige National Quality Award further defines educational equity as a commitment to narrowing the gap between high- and low-performing students and eliminating racial predictability of high and low achievement. In fact, MCPS's commitment to a broad portfolio of policies, practices, professional development, and stakeholder engagement activities to advance equity and excellence efforts across the school system has earned national recognition and likely contributed to its receipt of the Baldrige Award, its recognition as a finalist for the Broad Prize, and its acknowledgment in the literature for innovative efforts to address race, equity, and excellence in public school settings.

MCPS has implemented several initiatives to provide opportunities for staff, students, and other MCPS stakeholders to engage in exploration of the implications of race on academic success. For instance, race and its impact on teaching and learning and the work environment has often been a focus issue at bimonthly Superintendent’s Administrative and Supervisory (A&S) meetings. The district's Equity Initiatives Unit provides schools with an array of resources including brief presentations on equitable classroom practices; online modules to help staff understand the relationship between teacher expectations and student achievement; and other resources (i.e. books, documents, and web links). The Study Circles program, supported by the Department of Family and Community Partnerships, serves as an important resource to assist parents, students, support staff members, teachers, administrators, and supervisors in exploring and addressing challenges related to racial and ethnic differences that can impede student achievement and parent involvement in MCPS. Additional committees and programs also exist to further the district's commitment to equity and excellence.

**Primary Challenges**

MCPS is challenged to ensure that its strength does not become its weakness. Having courage to advocate for equity and excellence is one thing; however, failure to proceed deeper and systemically would erode the gains made by smart systemic investments and differentiated strategies to address equity and excellence. It is understood that race is far more difficult to discuss than educational excellence and equity. Furthermore, the school system’s longstanding commitment and financial support of differentiated strategies to support academic success for students in schools with high poverty, increased mobility, and
disproportionately more African American, Hispanic, and low socioeconomic status students through the red and green zone strategy, while improving achievement across all schools, is questioned by some and supported by others. The apparent tension within the MCPS community concerning resource allocation decisions to accomplish the district’s equity and excellence outcomes should be addressed. Tight budgets and competing interests are likely to fuel the debate on decision-making priorities for resource allocation in near- and long-term budget deliberations.

The student performance targets adopted by the Montgomery County Board of Education for all MCPS students are rigorous and attainable for all students, regardless of demography or zip code. However, notable disparities for African American and Hispanic students still exist as reported in the 2010 Annual Report on Our Call to Action. While 72.9% of African American students and 67.7% of Hispanic students completed Algebra or higher-level mathematics by the end of Grade 9, the percentage of completers among White and Asian American students was above 91%. Similarly, as reported in 2010, a gap of approximately 22 percentage points existed between the number of African American students completing Geometry or higher-level mathematics by the end of Grade 10 and the number of White student completers; the gap was almost 30 percentage points between Hispanic and White students. Suspension rates and special education placements for African American and Hispanic students remained disproportionately higher than rates for White and Asian American students in 2010, with even greater disproportionately existing for African American and Hispanic males. Increased understanding, ownership, and capacity among all practitioners are needed to support future efforts to close performance gaps for all students in all MCPS schools.

**Recommendations for Dr. Starr:**

**Near-Term Goals**

- **Develop and communicate a theory of action for equity and excellence for the next generation.** The theory of action that the superintendent articulates should make clear the core goals, values, beliefs, behaviors, and mindset that will guide and inform his approach to address race and culture and the pursuit of equity and excellence in a framework for all MCPS students. It should define the “Starr brand of leadership,” and the MCPS community should be able to rely upon this theory of action as a true representation of his leadership, core values, conduct, and commitment to the MCPS vision for educational equity and excellence.

- **Affirm, clarify, and support Our Call to Action.** Use “Listen and Learn” sessions, school visits, and focus groups, as well as day-to-day interactions within the MCPS school community and other settings, to communicate the district’s commitment to Our Call to Action. Emphasize the plan’s core values, vision, mission, guiding tenets, performance targets, and strategic and tactical goals and objectives to achieve equity and excellence for all MCPS students. Also seek to increase understanding among stakeholders and district and school leaders of the current work under way to advance MCPS’s stated commitments to:
  - Narrow the gap between the highest- and lowest-performing students so that all children will achieve at the highest levels possible, and
  - Eliminate the racial predictability and disproportionality of which student groups occupy the highest and lowest achievement categories.

- **Communicate the expectation that MCPS schools act in alignment with the district’s commitment to narrowing gaps and hold schools accountable to do so.** Similarly, expect all schools to work toward eliminating racial predictability and disproportionality of which student groups occupy the highest and lowest achievement categories—there is no “opt out” provision. One way to begin to revitalize the district’s work in this area is to ensure that all teachers in all schools utilize the equitable classroom practices that have already been identified and supported by MCPS through the provision of professional development.
Long-Term Goals

- **Assess and align the district’s equity-based initiatives.** Due to the wide range of equity-based plans, goals, strategies, initiatives, programs, activities, capacity building efforts, and accountability measures in the district, first conduct an assessment to establish baseline data and information to best inform the community of the extent to which these efforts are aligned, coherent, systemic, and supported. Evaluate the impact and influence on narrowing gaps and eliminating racial predictability and disproportionality of each initiative to determine which should be emphasized and supported and which should perhaps be discontinued. It may also be necessary to consider internal and external approaches to instructional and operational audits of performance in this area.

- **Develop a long-term plan dedicated to narrowing the gap and eliminating racial predictability.** The data and information generated by the assessment of current equity work can be used to lead a collaborative, comprehensive planning process that engages staff and a broad representation of stakeholders in the development of the district’s long term (5-10 years) approach to demonstrate continuous commitment to and investment in the MCPS core values articulated in *Our Call to Action*.

Enhancing a culture of respect and communication

**Key Successes**

MCPS has a strong foundation of impressive expressions of the organizational aspirations to be a school system in which people are respected; relationships are valued; work is collaborative; problem solving is interest-based; diversity of views and opinions are valued and respected without exposure to risk; and communications are characterized by openness and transparency among and between all stakeholders. The *Organizational Culture of Respect, Our Call to Action*, and the *Compact for School Climate* are exemplary statements of the district’s aspirations and expectations. As one example, the *Compact for School Climate* (2010) is a well-designed system to intervene in schools that manifest pervasive and persistent climate issues. The Compact was collaboratively developed by the deputy superintendent, chief operating officer, chief school performance officer, community superintendents, and leadership and staff from MCAAP, SEIU, and MCEA. The Compact’s purpose is to set forth the behaviors that MCPS expects of all employees at all MCPS work sites. This and other documents clearly communicate the shared responsibility of all MCPS stakeholders to be the “keepers” of the espoused organizational values, beliefs, norms, behaviors and relationships, and aspirations related to establish and maintaining a culture of respect.

MCPS is fortunate to have leaders and employees who recognize their responsibility to be contributing members of the MCPS learning community. Extensive collaboration with collective bargaining units (MCEA, MCAAP, and SEIU) and the Montgomery County Council of Parent Teacher Associations (MCCPTA) is systematic, effective, and valued at the system level. The uses of interest-based negotiations and problem solving and collaborative budget review and development processes are examples of a highly effective collaborative working relationship. The collaborative work and interest-based practices of MCPS were also examined and documented by Harvard’s Negotiation and Mediation Clinical Program in a report titled, “In the Interest of Academic Excellence: A Study of Collaboration and Conflict Management in MCPS.” Overall, Montgomery County has substantial reasons to be proud of its demonstrated success in the area of collaboration.
Primary Challenges
Real and perceived gaps exist between the espoused MCPS ways of respecting and working collaboratively and the actual conditions experienced by MCPS stakeholders and employees. The disconnect between aspirational statements, values, policies, and relationships and actual practices, behaviors, and dispositions has resulted in a gap between the espoused organizational culture and the enacted or “real” MCPS organizational culture. Absence of consistency across all MCPS roles and levels is a concern reported by some MCPS stakeholders as well. Several stakeholder groups also suggested that a number of factors, including the recent budget reductions, have negatively impacted morale. Best practice would suggest that morale is not strengthened outright but instead is a product of successful initiatives that demonstrate to employees the value that they deliver to the district. Finally, balance between the demands of work and family is a continuing challenge for many MCPS employees. The district will be challenged to explore real and symbolic commitments that recognize and appreciate the district work ethic, yet support MCPS employee and volunteer interests in family life.

Additionally, MCPS resources are currently not being allocated to maximize proactive and systemic supports to develop a positive school climate. The Compact of School Climate defines excellent supports for schools that meet the criteria of “persistently pervasive,” but “persistently pervasive” should not be a label schools aspire to achieve. While there are only a few MCPS schools at this stage, greater system emphasis is needed to help schools to embrace the Organizational Culture of Respect, and additional dimensions and indicators of the Organizational Culture of Respect should be measured to inform future work. The challenge of shaping the future culture and fostering ownership for the evolving culture is well within reach for MCPS leaders who have made historic investments to work together toward the common goal of creating a culture of respect.

RECOMMENDATIONS FOR DR. STARR:

Near-Term Goals

• Expect all MCPS employees to adhere to the principles of the Organizational Culture of Respect. Accept personal responsibility to lead by example and serve as the model for the Culture of Respect by “walking the walk, and talking the talk” in discharging the duties and responsibilities of superintendent. If Dr. Starr communicates to MCPS administrators and supervisors his expectation that others follow his lead, he will reinforce the Organizational Culture of Respect as a living, dynamic, touchstone for the “way we relate to each other.”

• Celebrate Culture of Respect ambassadors. Implement a sustainable, ongoing “campaign” to actively promote, celebrate, recognize, and reinforce individuals and groups (e.g. cafeteria workers, principals, school bus drivers, teachers, support staff, central office administrators, school board members, parents) affiliated with MCPS who demonstrate leadership aligned with the “Culture of Respect.” Recognizing models for respectful performance will allow these individuals to become leaders in this area as well.

• Improve morale through recognition. One immediate way to address morale is to develop an ongoing and authentic employee recognition program. Staff could be involved in creating and maintaining the process and take an active role in lauding the accomplishments of their peers. Additionally, there are opportunities to increase staff involvement in decision-making through work group and committee participation. MCPS could use focus groups and surveys to monitor the progress of these efforts.

• Broaden the Compact on School Climate to include schools AND district offices. First, review the planned 2011–12 roll-out of the Compact on School Climate to ensure thoroughness and consistency in communicating the Compact’s goals, purposes, expectations, and processes to all organizational units of the school system. While the focus of the Compact is on schools, consider broadening the focus to include other organizational units, such as district offices and operations, that may have cultures that conform to the “persistently pervasive” criteria.
**Long-Term Goals**

- **Support “family friendly” workplace practices and policies** that encourage MCPS staff and volunteers to achieve more balance in work life and family life. Many MCPS staff members have an “on demand” orientation to their work and spend the time required to get the job done. The same can be said for the many volunteers who contribute to the district mission. The MCPS model should be designed as a sustainable set of solutions, norms, and behaviors that recognize cost constraints, address a need for practicality, require districtwide application for all staff categories, and include short- and long-term targets that are monitored and measured to assess impact.

- **Modify surveys to measure espoused cultural elements.** MCPS should modify existing student, parent, and staff (site-based and non-site-based) surveys to better capture data to measure espoused cultural elements such as degrees of trust; team building; respecting opinions of others; encouragement of honest and open communication; safety for risk taking; and tolerance for diverse thought and perspectives without fear of retribution. Collection of this additional data will provide MCPS and the new superintendent with additional direction in addressing the gap between espoused and actual ways of working together in MCPS.

- **Embrace inclusive processes in selecting initiatives to promote a positive culture.** Involve students, staff, families, and other MCPS stakeholders in the selection process. By clarifying and enhancing the values, beliefs, dispositions and behaviors to maximize the contributions of all MCPS stakeholders, the superintendent can be the champion and chief model of the enacted MCPS culture.

**Community engagement, advocacy, and interest groups**

**Key Successes**

MCPS is widely recognized in the field of public education for being a district focused on “doing whatever it takes” to ensure the academic success of every student—regardless of race, ethnicity, socioeconomic status, language proficiency, or disability. This sustained focus has been supported by investments of many sectors of the Montgomery County community. MCPS has an impressive number of parent, advocacy, and interest groups that are actively engaged in efforts to influence decisions in the school system. In addition, the district has formed an array of partnerships with community-based organizations, businesses, service organizations, governmental agencies, and other entities that recognize the important contribution an excellent school system makes to attracting families seeking the best quality of life and education for their children. Numerous systems and processes are in place to foster community engagement, including forums, organized ways of engaging parents and community members in advisory capacities, Board of Education practices that provide multiple opportunities for public comment and feedback, and well-organized and highly sophisticated countywide parent associations.

MCPS has long served as a partner district in the Public Education Leadership Project (PELP), a collaborative effort facilitated by Harvard University’s Business School and the Graduate School of Education. MCPS uses the PELP Framework to adapt and apply its efforts to support coherent and integrated
relationships with stakeholders across systemwide improvement initiatives. Through PELP and internal efforts, leadership of MCPS, the Montgomery County Council of Parent Teacher Associations (MCCPTA), the Montgomery County Education Association (MCEA), Service Employees International Union, Local 500 (SEIU), and the Montgomery County Association of Administrators and Principals (MCAAP) have developed effective structures, processes, and practices to support collaboration. This commitment and its success over a period of years have earned MCPS recognition as a nationally respected model for collaborative labor management strategies. MCPS collective bargaining units have sustained their interest in supporting district reform initiatives and their commitment to collaboration to ensure that gains achieved are not undermined during an era of wage freezes. The engagement of the Board of Education, County Council, collective bargaining units, parent organizations, and other coalitions of partners has been important in building community will to support the Montgomery County education investment.

Primary Challenges
While some progress is evident in the area of community engagement, significant challenges remain as unfinished work for MCPS. Race, class, language proficiency, and geographic factors matter in terms of access to, and use of, voicing mechanisms to influence various decision-making and problem-solving situations. The district has not been systemically successful in engaging parents and community members who are African American, Hispanic, and poor in conversations and decision-making processes. Differentiated community engagement strategies are needed to give voice to all MCPS constituents. Additionally, while the success of MCPS labor and management working relationships at the system level is extraordinary and commendable, this success is not universally present in the relationships at all levels of the school system. Moreover, tight budgets will continue to be the reality for MCPS during these fiscally austere times, testing the collaborative structure that has been central to the work of the school system.

The relationship between MCPS and the Montgomery County Council is also an important challenge to be addressed for both the school system and the County Council. Unilateral, position-based approaches employed by either MCPS or the County Council are not likely to create the best conditions to promote and maintain Montgomery County as a progressive, diverse community that places a high value on education and offers a high quality of life for its citizens. MCPS and the Montgomery County government each have strengths that, if deployed in a complementary manner, can favorably influence policy and decision-making processes and establish productive, functional, collaborative efforts to address shared interests, needs, and challenges in the future.

RECOMMENDATIONS FOR DR. STARR:

Near-Term Goals
- **Differentiate community engagement strategies.** Assess current approaches to community engagement to ensure that engagement strategies are inclusive of stakeholder groups found to be previously disengaged or lacking access to the opportunity to share their voice. The district should be proactive in responding to any gaps identified to ensure that all stakeholders have the opportunity to contribute to efforts to improve public education in MCPS. Differentiated engagement strategies are necessary to reach loosely organized groups or demographic groups that are not presently organized; however, new and existing engagement strategies that are utilized should be consistently employed across the district.

- **Strengthen capabilities of the myMCPS tool.** By seizing the opportunity to immediately enhance and improve the myMCPS portal and critical applications to improve collaboration and instructional management, MCPS has an opportunity to increase communication and collaboration, continue to streamline systems, and increase customer satisfaction. Expansion of the myMCPS portal could include parent and student access, enhancement of myMCPS to improve functionality, implementation of Web-based attendance and scheduling applications, and the replacement of the online assessment application.
• **Identify and engage MCPS and the Montgomery County Council in shared interests.**
  Montgomery County Council leadership and governance structures should be engaged in efforts to jointly identify and explore short- and long-term shared interests that provide opportunities for proactive engagement of school system and county leaders in collaborative problem-solving processes. The 2012–13 budget development process is an immediate opportunity to foster mutual understanding of goals, priorities, limitations, and opportunities for collaboration between the Montgomery County Public Schools and the Montgomery County Council. Furthermore, as early as fall 2011, there will be opportunities to initiate a process to work with the County Council, County Executive, and other school systems to respond to efforts by the General Assembly to shift costs of teacher retirement to the local school systems. This shared endeavor could immediately strengthen the relationship with the County Council in a way that would benefit recurring collaborative processes, such as the budget creation process.

• **Involve MCPS leaders in “Listen and Learn” meetings.** “Listen and Learn” sessions provide the superintendent with opportunities to learn the perspectives and opinions of diverse segments of the MCPS community; these sessions may have additional value to foster organizational learning for leaders interested in gaining a deeper understanding of the views and perspectives of a wide range of MCPS stakeholders. It is therefore necessary to include central office administrative staff, school principals, parent association leaders, and collective bargaining unit leaders in the series of “Listen and Learn” meetings the superintendent will hold over the 2011–2012 school year.

**Long-Term Goals**

• **Develop and implement a community engagement plan to involve all constituencies.** By identifying, learning from, mobilizing, and bringing into alliance all constituency groups, their support can contribute to future MCPS educational reform efforts. The portfolio of current MCPS-led community engagement strategies demonstrates the limits of a “one-size-fits-all” approach. Embracing a differentiated set of strategies to mobilize diverse internal and external stakeholder groups will promote involvement in shaping the long-term MCPS vision, mission, goals, and purposes.

• **Ensure two-way flow of information to stakeholders.** Evaluate the district’s present approach to communication and management of customer service interactions with MCPS stakeholders. An ongoing “two-way” flow of information, both internally and externally, will ensure that stakeholders have accurate, timely information that can be used for decision-making. Privilege, position, and power should not influence the quality of service that customers receive. All MCPS stakeholders should be able to rely on the school system and all departments, offices, and schools to respond to inquiries, complaints, or problems advanced by internal and external stakeholders in a professional and courteous manner.
Operations

The charge to the Operations Committee of the superintendent’s Transition Team was to assess the current status of operations in MCPS, including efficiency and effectiveness of fiscal, human resources, facilities, communications, transportation, information technology, and materials management functions. In doing so, this committee analyzed many domains of operations functions, but focused primarily on information technology, budget, and facilities and land use.

Technology
Technology, particularly as applied to teaching and learning, is a key area of focus for MCPS. Technology provides students with knowledge and skills they will need to be successful in the 21st century and allows for efficiencies in operations. The role of technology in the classroom is critical both as a tool for instruction and the content of instruction. The superintendent makes decisions about technology when the issues are systemic, have strategic implications, and have significant budget implications that require review by the Board of Education.

Budget—Operating and Capital
The operating and capital budgets reflect the school system’s priorities as well as areas of focus and need. While resources to operate have been reduced in the last three years, capital funding has been available to build new classrooms, modernize schools, and fund needed system replacements. If operating or capital funding decreases during the next one to three years, it will be important that the superintendent’s decision-making process is transparent to staff, parents, and the community. If fiscal resources increase, prioritization will need to occur among the following: employee expectations for an increase in salaries, consideration to restore initiatives or items that have been eliminated due to recent budget cuts, finishing implementation of initiatives that have stalled (e.g., middle school reform), and the institutionalization of new initiatives.

Facilities and Land
The Montgomery County Public Schools occupies 200 schools and 35 support facilities that total approximately 24 million square feet of building on approximately 3,400 acres of land. The Educational Facilities Master Plan provides the framework for the six-year Capital Improvements Program (CIP), sets forth the agenda for future facilities planning, and addresses all facilities-related issues. The superintendent’s role in the CIP is to identify the priorities for planning and recommend an overall level of funding to submit a request to the County Council that represents the needs of the school system as well as the economic realities. Facilities and land have significant influence on the instructional experience through the quality of instructional facilities and environment, the size and capacity of an instructional environment, and the demographic composition of a school. Decisions made related to facilities and land can have a far-reaching impact even to the extent of impacting the local economy.
Over the past decade, MCPS has used the Baldrige Criteria for Managerial Excellence and process improvement initiatives to leverage systemic change both in the operating and instructional areas of the organization. Moving forward, one of the greatest challenges that will be faced by the school system is to maintain the progress that has been made in student achievement despite the current economic situation and significant budget reductions made over the past three years. During the first eight years of the last decade, more than 1,800 positions were added to the budget to address school system priorities. However, over the past three years, 1,287 positions have been eliminated as a result of budget reductions. In light of these and other challenges, the following areas of focus were identified for Dr. Starr's attention in the near- and long-term:

1. Clarity and consistency of strategy prioritization and initiative alignment;
2. Strategic and efficient allocation of resources;
3. Use of transparent processes to promote broader engagement; and
4. Maintaining high-quality infrastructure and emergency preparedness.

**Clarity and consistency of strategy prioritization and initiative alignment**

**Key Successes**

MCPS operations have benefitted greatly from the district’s focus on having a widespread, articulated, and prioritized strategic plan. As a result of a heavy focus on a clear and consistent strategy, the district has developed many effective processes and has a strong record of implementing initiatives. When an initiative is prioritized and aligned to the strategic plan, MCPS has a strong record of implementation. Some recent examples of the district's ability to implement aligned initiatives include initiatives related to increased efficiency. Particularly in light of the current challenging fiscal times, it has become a priority to increase the efficiency of all operations in order to identify and redirect resources to the most important priorities.

The district's focus on efficiency has resulted in strategy prioritization and alignment through the development of a comprehensive zero-based budgeting process. This process involved the development of an operating budget process that included review of all district positions and accounts to identify priorities and savings. In following this procedure, resources were allocated based on strategic plan priorities. Over the past four years, through the district’s Program Efficiency, Abandonment, and Redirection (PEAR) process, MCPS identified savings in the base operating budget totaling $182 million, including a 20% cut in central services. These cuts were made while maintaining improvement initiatives and minimizing impact on the classroom. Opportunities for staff and public input on possible reductions were included in the process. The district also implemented rigorous expenditure restrictions and tight financial monitoring to meet all midyear savings plan targets, saving nearly $70 million over three years, to make MCPS a reliable partner in times of fiscal shortfalls.

**Primary Challenges**

Ensuring that initiatives occur in an aligned, cohesive manner is a challenge for a large district like MCPS, particularly when operations functions can vary significantly throughout the district. Strategic planning is directly related to the budgeting process, as the strategic plan drives the budget. However, it should be noted that some stakeholder groups consulted in other areas under study questioned the efficacy of the many priorities and programs going on in the district. Though perhaps aligned to the strategic plan and implemented efficiently, the overall impact on district goals is uncertain and needs to be evaluated. For operations functions that are directly related to district priorities (i.e., directly connected to student learning, resource intensive, highly variable in quality), the district will need to continue to define success beforehand, plan extensively for rollout, monitor progress, and initiate improvements. While this process is currently in place for many district initiatives, stakeholder groups indicated that some areas within
Montgomery County Public Schools operations could benefit from stronger connections to the district’s strategy and planning process. For example, stakeholders emphasized the need to implement a cohesive plan to roll out technology initiatives that would include evaluation of the effectiveness of the use of particular technologies and the provision of professional development to support the use of the technology by teachers and staff.

Stakeholders also articulated their concerns about the ways that reductions have already affected operations and the frightening implications of future reductions. Because lack of funding in the CIP has impacted decisions around modernizations and maintenance projects, strategies will need to be in place to address aging buildings and systems. Complex planning issues including boundary studies, site selections, and feasibility studies will be impacted by the school system’s strategies and by possible future budget reductions as well.

**Recommendations for Dr. Starr:**

**Near-Term Goals**
- **Establish a strategic, aligned, and prioritized FY 2013 Budget.** For FY 2013, it is important to adopt an operating budget that is strategic, aligned, meets the needs of students, and is focusing specifically on ensuring alignment of the operating budget with the priorities of the school system as reflected in *Our Call to Action: Pursuit of Excellence*. Fiscal priorities for FY 2013 should be based on strategic initiatives.

**Long-Term Goals**
- **Rethink design, alignment, and investment.** MCPS takes pride in the way it has aligned its operations and budget with the district’s strategic plan. Given recent fiscal realities, it may be unlikely that the district will see revenue increases that will translate to more funds available for the classroom and for operations. Continuing fiscal challenges may actually be an opportunity to rethink the design of services and the way they are aligned with the budget. Redesigning and realigning may allow the district to receive a larger return on its investments.
- **Evaluate, align, and implement current and future MCPS CIP efforts.** Consider the opportunity to evaluate and continually ensure alignment of MCPS strategies with the district’s current and ongoing commitments to the CIP. It could be extremely beneficial for the district to maintain or increase the level of funding in the CIP to address needed capacity projects, modernizations, and countywide systemic projects in the FY 2013–2018 CIP. However, changes in funding and district priorities may require CIP planning to be revisited and revised.
Strategic and efficient allocation of resources

Key Successes
MCPS leadership and staff have skillfully and thoughtfully managed an increasingly limited set of fiscal resources available for the district's operations. The district has identified and implemented numerous efficiencies and processes as a result of its focus on aligned and thoughtful allocation of resources. Some recent efficiency increases have included telecommunications cost reductions, efficiencies in student progress reporting efforts, production of fully electronic student transcripts, streamlining of the summer school enrollment process, and automation of several forms related to processing and workflows (including Direct Deposit Authorization, Race and Ethnicity Identification, and Flexible Spending Account election forms). Additionally, MCPS has increased the efficiency of its weather emergency reporting systems and strengthened administrative and operational effectiveness through the myMCPS Business Center. Allocating resources to increase efficiencies in many areas has resulted in cost savings as well.

Primary Challenges
The largest challenge in maintaining and promoting thoughtful and aligned resource allocation has been the decline of fiscal resources available to maintain current programs and fund new initiatives. With fewer resources available for distribution, decisions must be made regarding how programs will be funded and how resources will be equitably distributed. These choices are particularly apparent within the information technology department. Stakeholders indicated that the current distribution of district technologies is not always equitable. Particularly prevalent were anecdotes of recent technology roll-outs that had been planned for the entire district, but, in light of recent budgeting changes, are no longer possible, resulting in unequal access to these technologies across schools (many stakeholders used Promethean Boards as a specific example). Plans for replacement of critical technology systems such as master scheduling and hand-held devices used for mClass need to be an integral part of the system's technology plan as well. Furthermore, the district lacks adequate funding for the Technology Modernization Project to maintain the planned four-year cycle of replacement of computers. In planning for technology initiatives, the district will need to continue to encourage innovation so that MCPS can “keep ahead” and also allocate technology resources effectively to prepare all students across the district for the 21st century.

The larger issue at hand continues to be the maintenance of programs and services despite a $182 million reduction in the base operating budget over the past four years as well as changes in growth and demographics. In addition to the reduction, there have been a total of $143.5 million of salary increases that employees did not receive. MCPS must identify funds to cover the Maintenance of Effort (MOE) penalty of $26 million and $17 million to replace the fund balance used to fund the FY 2012 operating budget. In the future, addressing issues related to MOE as a floor for funding so that services can be maintained, and additional penalties are not incurred, will be important. Additionally, MCPS will have to remain keenly aware of upcoming issues including state efforts to shift costs of teacher retirement to local school systems, reduction of funding from County Council for benefits, County Council's reduction of the six-year total for General Obligation bonds and the reduction of other funding sources (such as Recordation Tax and Impact Tax), and receipt of fewer dollars of state aid for the CIP than the amount for which MCPS is eligible.

RECOMMENDATIONS FOR DR. STARR:

Near-Term Goals
• Promote the equitable distribution of current and future technological resources. The allocation of technology that supports and promotes student achievement must be monitored to ensure equitable access to technologies needed to promote student achievement by all. An ongoing system of allocation and monitoring should be incorporated in an instructional technology plan and requires
the development of certain criteria and monitoring processes. An immediate way to begin could be addressing inequities left by incomplete or halted technology roll-outs.

- **Strengthen strategies for training and development around the use of technology.** Focus groups consistently indicated the need for increased professional development related to the instructional use of technology; many suggested that while MCPS has great technological capacity, not all staff know how to use technologies available to them. In the short term, meeting this need could include implementing technology-focused online training sessions, webinars, and video conferencing to model the effective integration of technology in teaching and learning. Monitoring and measuring the effectiveness of technology-focused professional development will be key to ensure that staff capacity and resource utilization are being given the same emphasis as technological advances.

- **Build and strengthen relationships with colleagues and stakeholders to problem solve MOE issues.** There is an immediate opportunity to collaborate with superintendents and boards of education in the other 23 local education agencies to address the MOE law and to ensure MOE becomes a floor for funding in the future, and penalties are placed on funding agencies. Collectively finding a solution to this issue could create greater leverage for MCPS in future budgeting processes and allow the superintendent to build strong relationships with colleagues from around the state.

### Long-Term Goals

- **Strengthen the technology plan to integrate aligned technology initiatives.** MCPS currently has extensive infrastructure, technological capacity, and the ability to devise and implement improvements. In such a situation, it can be very easy to have many ongoing technology initiatives, all well-intentioned and potentially beneficial in nature, that duplicate efforts, fracture resources, or are not complementary in result. The MCPS focus on continuous improvement will naturally drive staff to look for ways to use technology to make improvements, but without a broader plan, individual or even departmental efforts may remain detached from other efforts and therefore minimally effective. The district technology plan should include the articulation of a broader vision for how technology will promote advancements in the quality of classroom instruction, related staff development and capacity building, MCPS operations, and the allocation of resources in alignment with the district’s strategic plan. The plan should also include a means of defining success, outlining aggressive goals, and measuring success for the use of technologies in MCPS.

- **Continue to streamline and integrate systems.** Stakeholders suggested that MCPS could increase efficiency, communication, and accuracy through the streamlining and replacement of some critical business systems. Data collected and stakeholder input indicated that emphasis on integration of systems could ensure appropriate work flow and movement of data from one system to another. This streamlining and integration could continue to improve efficiency and allow resources to be allocated to other critical operations functions.

### Use of transparent processes to promote broader engagement

#### Key Successes
An important component of positive and productive relationships with MCPS stakeholders is the presence of distinct communications processes through which stakeholders can now participate in decision-making. Many of the district’s recent efforts to improve transparency in communication have involved financial reporting and the district budget. For instance, MCPS has made a significant effort to increase the number of stakeholders who are included in the initial and final decision-making meetings of the district’s budgeting process. The Budget Review Group includes presidents and executive directors of each of the three employee associations and the president and operating budget chair of MCCPTA. The district has also worked closely with county agencies in multiagency budget reform efforts to identify budget solutions involving consolidation or cooperation in providing common services. Additionally, MCPS increased
community outreach during the development of the operating budget with forums and other activities, resulting in stronger community support for the Board’s budget requests. The district also implemented numerous community involvement processes, including boundary advisory committees, roundtable advisory committees, and annual forums on the CIP, to broaden involvement in facility planning processes.

The district has also implemented new technologies to make finance and budget information more accessible. The recent development of a Financial Accountability and Transparency web-based application fulfills a state legislative mandate for a searchable online website, which is used to identify vendors receiving more than $25,000 from MCPS within any fiscal year. The district has also focused on increasing the transparency and readability of budget documents to ensure community familiarity with operating budget issues.

**Primary Challenges**
A few key challenges shape the district’s current pursuits to build strong relationships and communicate well with its stakeholders. While MCPS continues to work on balancing the needs of parents and community by including stakeholders in operations processes, the size of the district and the variety of opinions and interests make stakeholder involvement a challenge. Although representatives are invited to share input and participate in the process, the vastness of the district often results in many still feeling they were not heard or involved. One example noted by parents and community members is the process used for facilities projects. MCPS must continue to strive to communicate how decisions are made with respect to the modernization of aging facilities, the selection of new sites, and the replacement of mechanical systems. Because these projects impact communities directly, it is essential that communication be clear, consistent and ongoing and processes must respect the diverse interests of stakeholders. Finally, relationships and interactions with state and local governments also impact operations and budgeting processes. MCPS must continue to try to build relationship by increasing communication and collaboration.

**Recommendations for Dr. Starr:**

*Near-Term Goal*
- **Increase transparency in MCPS communications about the current budget resource allocation process.** In difficult fiscal times, increased transparency will likely be essential to gaining stakeholder support. Improving communications about the budget process and ensuing decisions will ensure that those impacted by decisions have had opportunities to provide input and that those individuals are communicated with once decisions are made. And decisions, once made, must be evaluated for their impact and incorporated into the body of transparent information that is used in the budgeting process.

*Long-Term Goal*
- **Increase transparency and involvement in future budgeting processes.** Regardless of whether MCPS sees an increase or a decrease in overall operating funds, extensive prioritization, tradeoffs, and subsequent transparency about how decisions were made will be required. The district’s strategic plan and related documents should guide prioritization about decisions that are made. There are opportunities to utilize current structures to gain stakeholder input in the budgeting process, but the new superintendent should also identify areas where additional input is required.
Maintaining high-quality infrastructure and emergency preparedness

Key Successes

MCPS has many strengths in infrastructure and in emergency preparedness that should be celebrated and used as the basis for future planning and management. The MCPS infrastructure is the totality of its technological, facilities and land, financial, protocols, and procedural mechanisms. These factors ultimately promote the ability of the district's students and staff to succeed. First, the district has realized efficiencies through better facilities management, including increases in the sustainability of school facilities and avoiding energy and utilities costs. These efficiency increases have included implementing construction to meet LEED standards, recycling, utility conservation, and green cleaning. As a result, MCPS uses 50 percent less energy per square foot in comparison to energy usage in 1978, 20 percent less compared with 1990, and 13 percent less compared with 2003. Additionally, by implementing the School Energy and Recycling Team (SERT) program, the district saved $2,490,000; the Peak Load Management (summer A/C management) initiative saved $1,700,000; energy conservation investments since 2003 saved $4,625,000; and utility procurement initiatives saved $1,000,000.

MCPS has continued to ensure that safety and preparedness within the district's schools remain a priority. The district successfully conducted disaster recovery tests at designated recovery sites to practice recovery processes, after which key enterprise systems were successfully restored. Furthermore, MCPS recently successfully developed and deployed the Access Control System at 83 elementary schools as well as the Visitor Management System that is linked to the Maryland sex offender registry at 120 schools. Recently, the district has also made significant improvements to technological systems and processes in the area of emergency preparedness as well. One such example includes the implementation of a new user identity management system and password management system aligned with nationally recognized security standards. This new system also included an upgrade of the core school system's network to handle data ten times faster in order to accommodate increasing network traffic loads that are spurred by the demand for online instructional resources.

Primary Challenges

While high-quality infrastructure and operational safety remain district priorities, the district operations staff also faces significant challenges. These challenges include the large enrollment and geographic size of the district, projected increases in district enrollment, natural age and wear over time on district facilities, a need to keep abreast of advances in technology that can enhance learning and increase efficiency, and increasingly limited funding. MCPS currently has a Capital Improvements Program (CIP), most recently outlined in the FY 2012 Capital Budget and Amended FY 2011–2016 CIP, but the district must continue to ensure that its CIP is appropriately funded and aligned with district strategy.
With projected increases in enrollment over the next decade, MCPS staff will need to address the subsequent increased demand for classroom space and needs for school upgrades. As district buildings age, and the variability of conditions of buildings increases, the district will need to develop and roll out a systematic process of future school modernizations based on facility conditions. This fall, 53 schools will be added to the modernization schedule following completion of their facility condition assessment. Determining how these needs are addressed will be important. Similar backlogs created by building maintenance issues, such as heating, ventilation, and air conditioning (HVAC) and planned life-cycle asset replacement (PLAR) projects, will also need to be addressed.

Finally, an immediate challenge which will require long-term management and planning is the issue of air quality in district buildings. Many stakeholders identified air quality as an immediate concern across MCPS buildings. Augmenting this concern is the growing backlog of HVAC system replacements that has increased as the district has grown. Funding for these projects has not increased at a rate that is commensurate with district square footage growth. Determining a plan for ensuring that high air quality is consistently in place will be important for MCPS.

**RECOMMENDATIONS FOR DR. STARR:**

**Near-Term Goals**

- **Build on the progress of the planned CIP.** The MCPS Capital Improvements Program is an important way that the district continues to build and strengthen infrastructure. In the coming fiscal year, there is an opportunity to ensure that capital projects in the adopted FY 2012 Capital Budget and Amended FY 2011–2016 CIP are completed on time and within budget and, where necessary, provide ‘relocatable’ classrooms prior to the opening of the school year. The district has a track record of completing the CIP on time and on budget, and a continued record of accurate planning and execution is important to maintain the quality of district infrastructure and operations.

**Long-Term Goals**

- **Ensure that air quality meets high standards throughout MCPS.** The health of students and staff is a critical prerequisite to success in the classroom and for all MCPS staff functions. The current estimated cost of HVAC system replacements is $150 million; coupled with expectations of additional needed replacements, it is estimated that an investment of $28 million per year over the next 10 years is needed to adequately address the issue. Addressing HVAC system needs and related initiatives should be highly prioritized within the CIP program and plans should be made to determine how to best identify, remedy, and prevent air quality issues related to HVAC systems in MCPS buildings.

- **Evaluate, align, and implement current and future MCPS CIP efforts.** There is an opportunity to evaluate and continually ensure alignment of MCPS strategy with the district’s current and ongoing reliance on the CIP and the twin commitments to equity and excellence. It could be extremely beneficial for the district to maintain or increase the level of funding in the CIP to address needed capacity projects, modernizations, and countywide systemic projects in the FY 2013–2018 CIP. However, changes in funding and district priorities may require CIP planning to be revisited and revised.
Conclusion

The Transition Team offers this report to provide Superintendent Starr with an overview of the successes and challenges of the Montgomery County Public Schools and to recommend near- and long-term goals to guide the district's work. The topics included in this report—Teaching and Learning, Culture and Context, Operations, and Professional Learning—are essential to eliminating the gap between MCPS' espoused theory of action and its theory in action. The team's inquiries and discussions examined the successes of the district but also revealed the inevitable challenges inherent in striving to be both equitable and excellent in student outcomes, pushing not just to expand access, but to insure achievement of the goal of equity and excellence for all students.

At times during the Team’s work, it seemed that multiple school districts were being described. Different stakeholder groups reported different realities. Indeed, Transition Team committees sometimes reported a single topic as both a strength and a challenge. We can only attribute this to the same presence of variability that exists between schools. Additionally, the “silo” effect stakeholders referenced may point to some units of the district discharging their duties responsibly without having a maximal impact on improving student outcomes. The Transition Team has attempted to provide evidence of the challenges and potential pathways for resolution. We recognize that, in a short period of time, we were not able to address all the issues some may have wished. We did approach our assignment with the conviction that MCPS can be an equitable and excellent school district for all of its students. Nothing that we found changed that conviction.

The Transition Team thanks Dr. Starr for this opportunity to serve the students of the Montgomery County Public Schools. The Transition Team would also like to thank the MCPS staff members without whom the team’s work could not have been accomplished in so short a period of time. Specifically, Brian Edwards, the chief of staff, and Sandra Napoli, the administrative services manager in the Office of the Superintendent of Schools, provided tireless help to team members in arranging travel, finding space for meetings, preparing materials for sessions, and coordinating the set-up of interviews and focus groups. Additionally, a number of individuals were recruited to take notes or otherwise provide assistance during Transition Team meetings over the summer months, including Juan Cardenas, Lori-Christina Webb, Maureen Ryan, Donna Hollingshead, Nicky Diamond, and numerous others. Thank you to all of you for your support in crafting a Transition Team Report for the new superintendent of schools in Montgomery County.
Appendix A

Transition Team Members

CHAIR
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Director, Urban Superintendent’s Program

EDITOR AND EXTERNAL COORDINATOR
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Team leader: Dr. Larry Leverett, Executive Director, Panasonic Foundation
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Dr. LaVerne Kimball, Community Superintendent, MCPS
Scott Murphy, Principal, MCPS, MCAAP appointee

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Team leader: John Kim, Chief Executive Officer,
District Management Council and Senior Lecturer, Harvard Business School
Larry Bowers, Chief Operating Officer, MCPS
Dr. Susan Marks, Superintendent of Schools, Norwalk, CT
Ruth Musicante, Professional Growth Consultant, MCPS, SEIU appointee
Appendix B

Evidence Gathered and Analyzed by the Transition Team

Sample Documents Reviewed

- Our Call to Action: Pursuit of Excellence
- The 2010 Annual Report on Our Call to Action
- The 2010 Malcolm Baldrige National Quality Award Application and Feedback Report
- The myMCPS web portal
- The Achievement Steering Committee Guide
- The Office of Performance Monitoring protocol
- Attaining the Seven Keys: Templates to Guide Analysis by School Teams
- The Deputy Superintendent’s Advisory Committee on Gifted and Talented Education Report
- The 2011 Results Book
- The Math Working Group Report
- District and State policies
- The School Climate Compact
- Organizational Culture of Respect
- Report of the Latino Youth Collaborative Steering Committee: A Generation Hanging in the Balance
- Professional Growth Systems for Administrators, Teachers and Supporting Services
- Closing the Gap: Recommendations for Improving Minority Student Achievement in MCPS
- Leadership Profile Assessment
- Latino Youth Collaborative Report
- Equity Framework
- Results from MCPS Surveys of School Environment (SSE)—Students, School-based Staff, and Parents
- Non-School-Based Staff Survey results

Interviews Were Conducted with One or More Members of the Following Stakeholder Groups

- Central office staff
- School principals
- Montgomery County Education Association (MCEA)
- Montgomery County Association of Administrators and Principals (MCAAP)
- Board of Education
- County Council
- Service Employees International Union (SEIU)
- Montgomery County Council of Parent Teacher Associations (MCCPTA)

Focus Group Participants (over 80 individuals attended at least one focus group session)

- Principals and other school-based administrators
- Parents
- Support services staff
- Teachers
- Central office staff
- Business and operations staff

(documents and names are listed in no particular order)
Appendix C

School and Cluster Representatives in Attendance at Focus Group Sessions

A diverse group of parents, teachers, principals, central office staff, service employees, and other MCPS staff and community representatives participated in one or more Transition Team focus groups as representatives of the following schools and clusters (among others):

Argyle Middle School  
Beall Elementary School  
Bethesda-Chevy Chase High School  
Blair Ewing Center  
Briggs Chaney Middle School  
Cabin John Middle School  
Churchill Cluster  
Clarksburg Cluster  
Daly Elementary School  
Damascus High School  
Damascus Cluster  
Albert Einstein High School  
Gaithersburg Middle School  
Great Seneca Creek Elementary School  
Harmony Hills Elementary School  
Kingsview Middle School  
Lee Middle School  
Magruder High School  
Maryvale Elementary School  
Richard Montgomery High School  
North Bethesda Middle School  
Northeast Consortium  
Northwood High School  
Oak View Elementary School  
Office of Human Resources and Development—Germantown  
Paint Branch High School  
Quince Orchard Cluster  
Rockville High School  
Seneca Valley Cluster  
Sligo Middle School  
Strathmore Elementary School  
Walter Johnson Cluster  
West Farm Depot  
Westover Elementary School  
Wheaton Cluster  
Wheaton High School  
Whitman Cluster  
Woodlin Elementary School  
Thomas S. Wootton High School
MCPS At a Glance

Our school system
- 146,709 students projected for 2011–2012
- Largest school system in Maryland
- 16th largest school system in the United States
- Students from 164 countries speaking 184 languages
- 200 schools
  - 131 elementary schools
  - 38 middle schools
  - 25 high schools
  - 1 career and technology center
  - 5 special schools
  - 34 National Blue Ribbon Schools

Our students
- Demographics (2010–2011)
  - 37.2 percent White
  - 21.3 percent African American
  - 25.1 percent Hispanic
  - 14.3 percent Asian American
  - 4.2 percent two or more races

- Services
  - 30.7 percent participate in Free and Reduced-price Meals System (FARMS)
  - 11.9 percent receive special education services
  - 13.0 percent participate in English for Speakers of Other Languages (ESOL)

- Performance
  - 85.7 percent graduation rate—#1 among the nation’s 50 largest school districts, Ed Week study
  - 5 high schools among the top 100 on the National High School Challenge
  - All MCPS high schools are among the top 1,000 on the National High School Challenge
  - 1637 average combined SAT score, Class of 2011
  - 62 National Merit Scholars
  - $264.6 million in scholarships, Class of 2011

System resources
- $2.1 billion FY 2012 Operating Budget
- $1.386 billion six-year Capital Improvements Program (FY 2011–2016)
- 22,229 employees
- 11,673 teachers
- 85.4 percent of teachers have a master’s degree or equivalent