



Monitoring Review Report

**Montgomery Public Schools
Montgomery, Alabama**

December 3-5, 2018

Monitoring Review Report

Introduction

This report summarizes the findings of the Monitoring Review held on December 3-5, 2018 to Montgomery Public Schools. The purpose of the Monitoring Review is to review the institution's progress toward addressing Improvement Priorities from the Special Review held on March 19-21, 2018.

Activities of the Monitoring Review Team

In preparation for the Monitoring Review, the team reviewed the system's progress report and related documentation. Once on-site, the team engaged in the following activities:

- Meetings with the institution head, governing body, Montgomery Public Schools (MPS) cabinet and leadership team
- Interviews with stakeholders representing school board members, system level leadership, school level leadership, parents, community members and business leaders
- Evidence review of artifacts provided to the team both prior to and throughout the Monitoring Review
- Actual Board Meeting observation while on-site
- Team deliberations and report preparation

The Monitoring Review Team used the findings from these activities and evidences to assess the progress the institution has made toward addressing the Improvement Priorities made by the Special Review Team.

Findings

The Monitoring Review Team's findings are organized by each Improvement Priority made by the March 2018 Special Review team. For each cited Standard, the Monitoring Review Team provides a rating followed by a summary of findings and directives for each Improvement Priority to guide next steps or recommendations for sustaining progress made. Results are reported within four ranges identified by the colors.

Color	Rating	Description
Red	Needs Improvement	Identifies key areas that need more focused improvement efforts
Yellow	Emerging	Represents areas to enhance and extend current improvement efforts
Green	Meets Expectations	Pinpoints quality practices that meet the Standards
Blue	Exceeds Expectations	Demonstrates noteworthy practices producing clear results that exceed expectations

Monitoring Review Report on Improvement Priority #1

Leadership Capacity Standard		Rating
1.4	The governing authority establishes and ensures adherence to policies that are designed to support system effectiveness.	Emerging

Improvement Priority 1: Review, revise, and comply with all board policies and state laws.

Findings:

When MPS received their Special Review Report, many things came to the forefront in terms of items to address. It was the decision of the leadership team to address the issue of board policy updates early in the follow-up process for multiple reasons. According to the MPS Progress Report, there had been numerous starts and stops at addressing various components of the board policies since 2016. Some additional work occurred in 2017, but holes existed. The Monitoring Review provided the impetus to continue with the process for updating board policies.

The MPS Overview revealed that under the current leadership of the MPS chief of staff, the policy review team consisted of the system attorney, ten principals and team leaders representing the departments best aligned to each section of the policy manual. Initial meetings among the representative stakeholders began with the same question: “What is the benefit/impact of us reviewing/revising these policies?” Interviews offered the opportunity for principals to discuss their work in revising policies. They unanimously reflected the process for updating board policies as a learning experience to become more aware of legalities, rules, processes and procedures. They were excited about being involved in the revision process.

MPS has met with preliminary success in documenting its policy modifications and has intentions of aligning these policies with state law under the direction of the MPS Attorney, though actual evidence of those legal citations existed only intermittently. Interviews shared that there was a policy on “Policy Review”; however, this actual policy did not currently exist. September board meeting agendas included first draft and second draft policy revisions as evidence that a process was taking shape. The board is progressing and evolving in this implementation, and it should be noted that some sections of the policy manual are still being reviewed and revised as a part of this policy review process. Continuing attention to detail, fully implementing the process, documenting actions and chronicling results is the key to sustaining the energy around policy revisions.

Directives:

1. Sustain collaborative work with the Alabama State Intervention Team, MPS Superintendent, MPS district level staff, and the MPS Board of Education to develop, adopt, and adhere to a written policy outlining specific guidelines, timelines, and schedules on the policy revision process.
2. Ensure all school board policies are aligned to state law, if applicable.
3. Adhere to and sustain the practice of including and documenting policy review, revision, development, and adoption decisions on the agendas for scheduled board meetings and work sessions.

Monitoring Review Report on Improvement Priority #2

Leadership Capacity Standard		Score
1.5	The governing authority adheres to a code of ethics and functions within defined roles and responsibilities.	Emerging

Improvement Priority 2: Develop, document, implement, and adhere to a code of ethics policy which defines the specific roles and responsibilities for members of a school board.

Findings:

One of the first activities in which the MPS board engaged following the Special Review was the Alabama School Board Association (AASB) Self-Evaluation completed by MPS board members in May, 2018. Topics on self-evaluation included:

- Board Superintendent Relationships
- Board Meetings
- Community & Collaboration
- Leadership, Communication & Relationships
- Personnel Relations
- Student Achievement
- Financial Management
- Policy Development
- Vision, Goal Setting
- Media Relations

The results of the self-rating by the board are listed below.

Lowest rated individual items: (0-5 scale)

- Members refrain from speaking for Board on issues on which the Board has no official position (1.3)

- Focus on issues rather than personalities (1.4)

Highest rated individual items: (0-5 scale)

- Encourages superintendent's participation in professional associations and activities (3.7)
- Encourages media to attend board meeting by providing adequate space and notice of meetings (3.7)

Based on the results of the self-evaluation, board members adopted and agreed to an action plan. As reviewed by the review team, the action plan was indeed developed based on the Board's self-evaluation; however, it contained very vague wording for actions that were not truly measurable. There is a need to continue the self-evaluation process and re-evaluate the action plan, since both were developed based on the results of a self-evaluation completed by board members, four of whom are no longer on the Board. The self-evaluation also does not include the ratings of new board members.

Board members participated in a board retreat on Sept 5, 2018 conducted by Alabama Association of School Boards (AASB). The team reviewed the agenda from the retreat which focused on the following topics: operating agreements, team building, prioritizing MPS needs and establishing a meeting calendar to review student data. Six of the seven members who were on the Board at the time attended the retreat.

The review team studied the board meeting agenda from Sept 11, 2018 indicating the *Certificate of Affirmation of School Board Members* was read at the Sept 11, 2018 board meeting. A signed copy was presented to the team. The Certificate of Affirmation addressed board member conduct; however, it is not part of the MPS Policy Manual. The decision moving forward was made to have newly elected board members read and sign the affirmation once sworn in to office. The board members reviewed a model code of ethics policy; however, they have not officially adopted a policy on a code of ethics.

In interviews, the superintendent stated that she and the board worked on interpersonal relationships, highlighting the differences between operating as an individual and as a board member. The superintendent noted that, in the past, some board members went through the required trainings and received the certificate; however, when it came to implementing what they were supposed to have learned during the training, appropriate conduct didn't necessarily follow.

Board members interviewed included current and outgoing members. When asked about things the Board would like to see in five years, one member's response was that she hoped the community would trust them. Others explained they understood the Board's roles and responsibilities and board members should maintain professional decorum. Board members also relayed wanting trust, accountability and transparency. Other thoughts included the need for everyone to "come on board" for the body to be truly operational. One final sentiment was that even though board member relations and actions have improved, there are still instances

when some members' words and actions do not align with roles, responsibilities, and expected meeting decorum. Most members were hopeful that with the change in the Board, including new members, improvements would follow.

The review team had the honor of attending the organizational board meeting held on December 4, including the installation of the new board members. An interesting outcome was the election of the board president and vice president who both were elected by 4:3 votes. Both leadership positions were filled by newly elected board members even though an incumbent was nominated for each position. Additionally, as indicated in the minutes of the September 11 meeting, the new Certificate of Affirmation statements were read orally and signed during the Dec 4, 2018 meeting following installation. The new Board also had an additional work session on "The Eight Characteristics for Highly Effective Boards" scheduled later in December 2018. Another activity included rescheduling a book study which was previously scheduled on "Governing for Achievement" and was cancelled because of the election of the four new board members. The book study will be facilitated by AASB and funded by the Alabama State Department of Education (ALSDE) in January 2019.

Directives:

1. Participate in and document professional development focused on team building to develop trust and build positive relationships.
2. Conduct a literature review, case study, and/or book review on highly effective governing boards and professional decorum.
3. Develop, document, and adopt code of ethics and civility expectations and/or guidelines specific to the MPS Board of Education.
4. Participate in professional development focused on board governance and subsequently identify and demonstrate characteristics of a highly effective governing board, including professional decorum.
5. Maintain the practice of annually conducting, discussing and documenting a Board self-evaluation.
6. Formulate and document behavioral and/or productivity objectives, strategies/actions, and evaluation measures based on the results of the Board self-evaluation.

Monitoring Review Report on Improvement Priority #3

Leadership Capacity Standard		Score
1.8	Leaders engage stakeholders to support the achievement of the system's purpose and direction.	Emerging

Improvement Priority 3: Implement a communication plan that ensures timely and consistent dissemination of information and awareness of the system's decisions and actions by internal and external stakeholders.

Findings:

The review team learned from the opening presentation that the MPS superintendent has used a collaborative process to engage cabinet members, principals and system leaders in monthly leadership meetings to communicate and discuss pertinent and relevant information. The MPS leadership team, especially those involved for the first time, appreciated the opportunity to hear directly from the superintendent and was eager to be a part of the dialogue.

The ALSDE liaison (on assignment within MPS), acknowledged how important accurate information was to the communication effort within the system both internally as well as externally. Additionally, community partners recounted the superintendent also has started the process of meeting with local municipalities and civic organizations to discuss school system priorities as a way of turning the tide of negative news replacing it with positive and accurate information. The superintendent reported that the newly proposed organizational plan was embargoed at the time of the Monitoring Review, awaiting ALSDE approval. However, the superintendent made it clear that once the plan was approved and released to staff, it would be made public as another indication of her commitment to public transparency.

Board members were pleased to see that positive stories were being shared publicly about the schools. They shared in interviews it was exciting to see the direction in which the schools are going and the overall good news they were hearing about the school system. Veteran and new board members alike reported enthusiasm for the changes the superintendent and cabinet were instituting and sharing with the public.

Internally, the new Chief Academic Officer (CAO) reported providing checklists to principals to ensure that Twitter, Facebook, school websites, and School Messenger are kept current and providing accurate information to all stakeholders. Principals reported in their interviews that they were learning to "Tweet" and excited to be able to share the great things going on in their schools particularly stories of their students successfully utilizing social media.

While MPS has begun to implement a communication plan, more work is recommended in this area to clearly ensure that timely and consistent information is shared with internal and external stakeholders. Additionally, policies and procedures are necessary in utilizing social media. Parameters, professional learning and ongoing support as well as guidelines for getting started are needed to ensure success in this environment.

Directives

1. Implement a practice whereby the operational effectiveness of the organizational plan is evaluated and communicated to stakeholders.
2. Ensure accountability of principals for communicating information to their staffs.
3. Ensure appropriate and timely meetings are held to strengthen communication between and among central office staff, departments and schools.
4. Provide consistent, accurate and timely information to the community.
5. Monitor the effectiveness of collaboration strategies and processes with local municipalities to continue to build working relationships.
6. Review and update board policies concerning communication ensuring the inclusion of specific policies and procedures on the use of social media.

Monitoring Review Report on Improvement Priority #4

Learning Capacity Standards		Score
2.1	Learners have equitable opportunities to develop skills and achieve the content and learning priorities established by the system.	Emerging
2.2	The learning culture promotes creativity, innovation and collaborative problem solving.	Emerging

Improvement Priority 4: Foster a culture of student-centered learning that promotes research-based practices, including personalized learning, differentiation, technology integration, collaboration, inquiry-based learning and higher order thinking.

Findings:

Interviews and documents provided to the review team illustrated that MPS principals received enhanced professional learning on increasing student engagement to maximize learning. Principals have implemented the Effective Learning Environments Observation Tool® (eleot®) in classrooms throughout the system, with approximately 1,000 eleot observations having

occurred. Some principals indicated they felt better equipped to share data with the teachers as a result of both the training and use of eleot. Others shared that the partnership and training with AdvancED and the ALSDE has helped them see that they are a part of the continuous improvement process. Principals overwhelmingly stated that they felt tremendous support this school year as compared to previous years also pointing out that they “felt their voices were being heard.” MPS superintendent has shared that principals are working together to be more transparent and collaborative to grow their students’ success.

District leaders are working to provide professional development incorporating the results of eleot, in addition to assessment data, while being intentional about providing aligned learning activities. The superintendent shared, “there is a grass roots focus on delivering professional development to district leaders who can then push the training out to the schools.” The alignment between the eleot environments and professional development goals throughout the system is consistent with district-wide continuous improvement goals, and affords staff the opportunity to focus efforts intentionally on these collective goals.

By using eleot results, MPS educators are making progress in ensuring their students are exposed to opportunities for learning that embrace innovation, technology, collaboration and higher order thinking skills, among others. The culture that is evolving is also a testimony to this improvement, as teachers discover the value in eleot data, coupled with student assessment data.

From interviews, the review team learned of optimism and enthusiasm for future improvements from numerous stakeholders at the school level, including principals. Sustaining this positivity and translating it into a culture is dependent upon institutionalizing collective practices and processes that are emerging in individual classrooms of schools across the system.

Consistently collecting school-level eleot data, utilizing the data at the school level, and rolling the data up to a system-wide view are imperative for systemic and sustained growth and success. Continuous attention to the district’s assessment system to ensure that it is comprehensive and includes formative assessments will more likely support student success. MPS is becoming poised to deliver a comprehensive process for quality decision-making, involving professional learning, staffing, resources and materials all rooted in data. The MPS superintendent reportedly reminds staff often to “trust but verify!”

Directives:

1. Utilize eleot results at the system and school levels to identify professional learning opportunities aligned to those results.
2. Design and implement a comprehensive assessment system that includes the scheduled administration of formative measures and use of the results from these assessments to adjust classroom instructional delivery as needed.

Monitoring Review Report on Improvement Priority #5

Learning Capacity Standards		Score
2.6	The system implements a process to ensure the curriculum is clearly aligned to standards and best practices.	Emerging
2.7	Instruction is monitored and adjusted to meet individual learner's needs and the system's learning expectations.	Meets Expectations

Improvement Priority 5: Engage teachers, content area specialists, and other instructional staff in collaborative conversations about curricular processes and instructional expectations.

Findings:

The system made progress in the curriculum and instruction areas in multiple ways. The team reviewed meeting artifacts that provided evidence that MPS enhanced a multi-dimensional protocol to evaluate curricular resources made available on the system's website. Previous practice included additions of curricular materials for staff to access; however, according to stakeholders, there were only minimal steps taken to organize these curricular materials, specifically to systematically remove or archive those that were being replaced. In the spring of 2018, the system deployed a cross-sectional team of leaders to review the materials and make decisions about how or if to retain them. Included in these discussions were leaders from the system and school levels; however, meeting sign-in sheets revealed that while leaders were involved, no classroom teachers were included in these activities. Explanatory documents were added to the website resources to describe the materials that were retained and offer implementation strategies. While MPS' well-utilized classroom elet sweeps provide instructional data, the lack of classroom teacher input results in an incomplete analysis with which to make judgements about the true impact of the implementation of each resources.

Interviews revealed enthusiasm among principals in the direction of curriculum and instruction at MPS. The addition of the new CAO, who has been very inclusive of school level leadership in his early efforts, has inspired a renewed focus on instructional progress. The establishment of an academic roundtable, with relatively comprehensive representation, has provided a forum to have open conversations, including conservations about instructional practices, protocols and support. One of the first outcomes of the roundtables has been wider communication of expectations as evidenced by a newly developed flowchart for information. The plan is to include quarterly roundtables (September, January and May) with only one having occurred prior to this review. The agenda for the first Academic Roundtable Discussion included the following outcomes:

- Derive a deeper understanding of the system’s accountability report card
- Establish criteria for monitoring and supporting teaching and learning
- Develop consensus with classroom walkthroughs
- Reflect on the 2017-18 Scantron Performance Series reporting
- Discuss how effective professional learning can help “move the academic needle” within the system
- Identify next steps

The agenda from the first meeting set the expectations and ground rules. Minutes or an evaluation of the meeting were not available. Principals acknowledged tremendous hope and confidence that these roundtables would provide the communication and connections for which the schools were looking to enhance existing channels for sharing instructional practices and strategies. Involving lead teachers in this process would close the loop of participation.

The practice of eleot sweeps in the MPS system has enhanced the learning culture in major ways. The data collected from these sweeps alone was significant in terms of measuring trends, identifying gaps and recognizing strong personnel. Walkthroughs and eleot sweeps combined to provide valuable data to use in a process in which teachers could monitor and adjust instruction to ensure individual learners’ needs and the system’s learning expectations were being met. But the larger benefit existed in the professional growth of leaders and educators as they trained and prepared for the eleot sweeps. Collaboration and conversations around learning were a welcomed byproduct of the eleot and AdvancED’s “Art of Engagement” training that supported the lead teachers and administrators. The principals related tremendous appreciation for the willingness of the superintendent, and other cabinet members to not only join them in the training, but visit their schools with eleot in hand working with them as they perfect their instructional practice. Similarly, the cabinet and other leaders were delighted to have a stronger, more connected relationship with the schools as a result of this training.

The review team noticed consistently missing elements throughout the conversations regarding curriculum and instruction. Teacher representatives were noticeable absent in the curricular review discussions. The review team also noted the absence of evaluative activities that connect successful practices and useful resources with supportive professional learning. Conversation about student data should determine what is working, what needs bolstering, and what needs to be eliminated.

Directives:

1. Include representative groups of teachers, in addition to the content area specialists, and other instructional staff in reviewing the curricular documents housed on the website. These stakeholders should determine which items will be mandated for implementation.
2. Ensure adherence to the agreed upon practices by clearly communicating instructional expectations, as well as monitoring for consistent implementation.

Monitoring Review Report on Improvement Priority #6

Resource Capacity Standards		Score
3.7	The system demonstrates strategic resource management that includes long-range planning and use of resources in support of the system's purpose and direction.	Meets Expectations
3.8	The system allocates human, material, and fiscal resources in alignment with the system's identified needs and priorities to improve student performance and organizational effectiveness.	Meets Expectations

Improvement Priority #6: Sustain the implementation and bolster the monitoring of an effective budget process to strategically manage resources that meet current budgetary requirements and allocate human, material, and fiscal resources in alignment with the system's priorities.

- 1. Routinely involve newly elected board members and system leadership, along with veteran board and system leadership, in the budget analysis process to ensure that all funds are being used to strategically support the system's purpose and direction and continuous improvement journey.**
- 2. Implement and monitor action steps, including timelines, that demonstrate how MPS is reducing locally funded units to increase revenue for the system.**
- 3. Ensure that Fiscal Year (FY) 2020 Budget is aligned with the system's strategic plan goals to support MPS priorities and its continuous improvement efforts.**

Findings:

As the initial step of the response to this Improvement Priority, MPS felt the need to have a dedicated cabinet member whose responsibility would be to lead the system's financial division. MPS leaders reported that in the absence of such leadership, the system had faced many challenges. A full-time Chief School Financial Officer (CSFO) was hired, and the superintendent proudly described his early successes, particularly the collaborative process he used to develop the FY 2019 Budget for MPS. The new CSFO relayed to the team that this was the first time in several years that the budget was approved by the MPS school board and submitted to the ALSDE by the September 15 deadline. This claim was well documented in written form by the ALSDE and reinforced by the ALSDE Finance Department liaison to MPS.

The CSFO reported that he had done a budget analysis (revenues and expenditures) for the previous three years for each school or department as well as the system, noting trends, before having discussions with school and system leaders. He next began the process of working with department heads to reduce their budgets by 30 percent that would result in over \$3.3 million in savings for the system. Additionally, he began to hold meetings with leaders regarding the

effective use of funds and how to increase their revenues. Principals stated to the review team that they were very appreciative of the CSFO visiting their schools and providing guidance on budget management. They reported being very excited with this new level of support.

The review team learned the CSFO conducted two advertised public budget hearings for system and community stakeholders as required by *the Alabama Fiscal Accountability Act*. During the presentations, the CSFO answered questions and received feedback from school board members and others before finalizing the FY2019 Budget for MPS. The system ended its FY2018 with a one-month-operating budget of \$23.1 million surpassing the FY2017 amount of \$15.5 million as well as the 2017 required one-month operating budget of \$19.1 million. Artifacts and interviews shared additional communication efforts including monthly updates of the financial statements provided by the finance department to the Board and superintendent during monthly board meetings. The team reviewed budget presentations, financial statements and audits posted on the system's website.

The review team observed that while the process has begun to align the system's goals to fiscal matters, more work is recommended in this area to clearly align the goals of the system's strategic plan and fiduciary expectations and/or support to accomplish each goal of the plan. Although the system has begun the process of reevaluating the allocation of locally funded units that have been used to hire additional personnel, this process should be expanded to ensure all leaders (board members, administrators and other selected staff members) are involved in the process.

Recommendation:

Sustain the implementation and bolster the monitoring of an effective budget process to strategically manage resources that meet current budgetary requirements and allocate human, material, and fiscal resources in alignment with the system's priorities, including the following:

1. Routinely involve newly elected board members and system leadership, along with veteran board and system leadership, in the budget analysis process to ensure that all funds are being used to strategically support the system's purpose and direction and continuous improvement journey.
2. Implement and monitor action steps, including timelines, which demonstrate how MPS is reducing locally funded units to increase revenue for the system.
3. Ensure that the FY2020 Budget is aligned with the system's strategic plan goals to support MPS priorities and its continuous improvement efforts.

Insights from the Monitoring Review

The initial overview at the beginning of the Monitoring Review provided a look at the journey upon which MPS has embarked since their Special Review occurred. The interim superintendent applied for consideration and was named superintendent effective June 1, 2018. This full commitment on her part, provided a foundation of security the system was seeking. Since then, the activities from responding to the Monitoring Review Improvement Priorities to considering

the implications of those activities to preparing for an upcoming Engagement Review have taken center stage in the system's work. The superintendent began by developing and distributing a one-page reference sheet, including the Improvement Priorities Directives and AdvancED Performance Standards, to each district staff member. The superintendent, in partnership with the ALSDE liaison and the remainder of the cabinet, are working diligently to embed accreditation references into the daily work of the system. Meeting agendas hold references, and, with the use of eLeot across the system, the language of those environments is widely understood.

With a significant journey still ahead, MPS is finding a way to interconnect continuous improvement efforts, their vision, and their daily mission "to engage, educate, and inspire our students to succeed in college, career, and beyond!" More importantly is the realization that, according to their motto, they are "Moving Forward!"

Accreditation Recommendation

Based on the findings of the Monitoring Review Team and subsequent review by the AdvancED Regional Commission, AdvancED concludes that the institution is emerging in their efforts to meet the following AdvancED Performance Standards:

- 1.4 The governing authority establishes and ensures adherence to policies that are designed to support system effectiveness.
- 1.5 The governing authority adheres to a code of ethics and functions within defined roles and responsibilities.
- 1.8 Leaders engage stakeholders to support the achievement of the system's purpose and direction.
- 2.1 Learners have equitable opportunities to develop skills and achieve the content and learning priorities established by the system.
- 2.2 The learning culture promotes creativity, innovation and collaborative problem solving.
- 2.6 The system implements a process to ensure the curriculum is clearly aligned to standards and best practices.

In accordance with AdvancED policies, the institution continues to be placed in the accreditation status of Accredited Under Review. The Montgomery Public Schools must host a Monitoring Review by June 1, 2019 to enable a review team to assess the progress made in each Improvement Priority listed in this report. No less than two weeks prior to the scheduled review, the institution must submit a Progress Report detailing the steps taken, with supporting evidence, to address the Improvement Priorities. A report template will be provided to the institution.

Next Steps

The MPS continuous improvement journey is filled with opportunity for its students. The Special Review and subsequently this Monitoring Review have provided feedback at a time when the MPS family is ready to hear and act upon it. Their adopted motto: “Moving Forward” speaks to the overall theme for their efforts. A revised and stable leadership team, coupled with the support from ALSDE and AdvancED, will reinforce learning for the students of MPS.

As the system moves forward in their continuous improvement activities, they are reminded to continue to look to the information shared within this report, as well as the AdvancED Standards and elect data, both of which have been integrated into MPS practices. A new and energized board of education, eager to partner with system leaders as they steer these efforts, provides the potential of a healthy basis for success. This leadership foundation also offers reassurance and support through challenges along the way.

Key to sustaining enthusiasm and energy is an unwavering commitment to serving the students of this system who have entrusted their futures to the educators of MPS.