

# Six Lessons for Pursuing Excellence and Equity at Scale

Efforts in Montgomery County, Maryland, to “raise the bar and close the gap” depended on deep changes.

By **Stacey M. Childress**

**A**mericans look to their public schools to perform two important tasks: preserving the nation’s competitiveness in an increasingly global economy and ensuring socioeconomic mobility from one generation to the next. Disappointing international comparisons and persistent opportunity gaps for low-income and minority students have increased the country’s focus on these tasks. As a result, today’s educators must address two distinct performance challenges: raising the outcomes of top performing students against international benchmarks while at the same time accelerating the learning of students who are behind so that they eventually perform at top levels, too. The job of district leaders is to create the conditions under which every school can achieve this excellence and equity for students; they should not just serve as beacons of hope.

**STACEY M. CHILDRESS** is a senior lecturer at Harvard Business School and co-author with Denis Doyle and David Thomas of *Leading for Equity: The Pursuit of Excellence in Montgomery County Public Schools* (Harvard Education Press, 2009).



*Montgomery County Public Schools Superintendent Jerry Weast speaks with students. (Photo courtesy MCPS.)*

Over the past decade, advice from academics, consultants, and foundations has converged around a few core ideas: hire great principals and teachers, make data-driven decisions, hold everyone accountable, build a strong culture, and engage stakeholders. Districts seem to be listening; strategy documents posted on many of their web sites contain some version of these prescriptions. Yet few are delivering excellence and equity for all of their students.

Montgomery County Public Schools (MCPS) in

Maryland has made progress on the dual dimensions of excellence and equity for its 140,000 students, about half of whom are black or Hispanic. When Superintendent Jerry Weast arrived in 1999, the district had a strong reputation for quality. But the district's demographics had shifted rapidly through the 1980s and 1990s, and board members and community leaders were faced with the troubling reality that, along with some of the best schools in the country, Montgomery County had many schools that performed at levels similar to some of the low-

est performing urban schools in America. The board hired Weast to create a new reality in which all students in the district had access to a great education.

In our book, *Leading for Equity: The Pursuit of Excellence in Montgomery County Public Schools*, my co-authors and I tried to understand and explain the district's efforts to "raise the bar and close the gap." As the top quartile of performers in MCPS did better from 2003 to 2008, the lower quartiles improved even faster. Dedicated teachers and principals in elementary schools around the county worked to cut in half the literacy and math gaps between early grade black and Hispanic students and their white counterparts on state exams. Hispanic kindergarten reading levels were 25 points lower than for white students; today, the gap is single digits. A number of schools that were among the lowest performing in Maryland achieved proficiency rates above 90%. The high schools doubled the number of black students passing Advanced Placement exams.

How did Montgomery County do it?

They hired great people, made data-driven decisions, and followed all of the other prescriptions. The chapter titles in *Leading for Equity* reflect these practices, focusing on what the district did to develop a strategy, build stakeholder support, invest in its people, create structures for support and accountability, and change its culture. In keeping with

## As the top quartile of performers in MCPS did better from 2003 to 2008, the lower quartiles improved even faster.

these familiar approaches, when asked for the key to success, employees at all levels of the system answer, "professional development." It's true that the district invests heavily in the skills and knowledge of its people. But their total per pupil spending is about the same as in other East Coast cities such as Washington, D.C., and New York, and less than in Newark and Boston. And public education has long worshipped at the altar of professional development. So what is distinctive about the Montgomery County approach? Why did its focus on people, data, stakeholders, and all the rest lead to improved performance overall and a shrinking of key measures of inequity? Beyond the generalities, the actual content of the MCPS approach is important. Six lessons from the district's work cut across their implementation of conventional approaches. These lessons push beyond *what they did* to *why it worked*.

### Lesson #1. Implement common, rigorous standards with differentiated resources and instruction.

MCPS developed a "Pathway to Success" for students based on higher standards than the state requirements. The Pathway set performance benchmarks in various content areas at grade levels from kindergarten through graduation. District leaders shared information about the Pathway with teachers, students, and parents and overhauled the curriculum to support the aggressive benchmarks. Concurrently, they introduced differentiated resources and instruction.

Most low-income and minority students were clustered in about half of the district's schools, dubbed the Red Zone, which significantly underperformed the other half, dubbed the Green Zone. Weast and his team operated on the assumption that all students could meet the standards, but those who were farthest behind needed more time and more support to reach them quickly. MCPS increased resources to the schools most of these students attended while holding steady in the rest. This financed the second part of the differentiation strategy — giving teachers the knowledge and tools

## Montgomery County Public Schools

Rockville, Maryland

Largest in Maryland, 16th largest in U.S.

Enrollment: 141,000 students

Schools: 200

Teachers: 11,500

### Demographics:

	RED ZONE	GREEN ZONE
Enrollment.....	70,500	70,500
Minority.....	80%	43%
ESL .....	30%	10%
Free/reduced-price lunch .....	51%	12%

[www.montgomeryschoolsmd.org/](http://www.montgomeryschoolsmd.org/)

to better diagnose individual student needs, develop potential solutions and put them into practice, and reflect on their effectiveness. When people around the district cite professional development as a key success factor, these investments are on their minds.

A few years into the reform, the district converted the Pathway into the “Seven Keys to College Readiness,” based on data about the outcomes that successful college-bound students demonstrated at

marks. MCPS recognizes that effective teachers are the most important factor in helping all students meet or exceed rigorous academic standards.

### **Lesson #2. Apply “value chain” thinking to the K-12 continuum.**

A value chain is simply a series of activities, each of which adds some value to an eventual outcome. Because the activities along the chain are interdependent, mapping backward from the desired outcome to the beginning of the chain can increase quality. This value-chain thinking is the engine that powered the insights from lesson one. With college readiness defined by the Pathway to Success (now the Seven Keys) as its ultimate goal, MCPS could better create curricula and benchmarks that built on each other starting in kindergarten.

For instance, the research and evaluation department found a correlation between students who read at text level six in kindergarten and those who scored “advanced” on the state’s 3rd-grade reading exam. Using this information, district leaders worked with teachers to change the focus of kindergarten reading instruction so that all students would be positioned to achieve a top reading score in 3rd grade. Similarly, data analysis showed that although completing algebra by the end of 8th grade was clearly a predictor of AP math success, this was impossible for most students because too few were assigned to the necessary 5th-grade advanced math course. The district office created a Mathematics Pathway that charts the links between math courses from kindergarten to high school. Administrators also encouraged elementary and middle school principals to consider organizing their schools so all students would have access to coursework necessary to successfully complete algebra before high school. They also shared the Mathematics Pathway with parents beginning in kindergarten so that they could become better advocates for their children.

### **Lesson #3. Blur the lines between the traditional roles and responsibilities of the school board, leadership team, principals, teachers, and parents.**

District leaders often work hard to keep different groups in their proper roles: boards govern, managers decide, staff implements, and parents and students benefit. Superintendent Jerry Weast instilled shared accountability by blurring the lines between these traditional stakeholder roles. As a result, multiple groups felt responsible for the district’s success.

The district’s capacity to analyze problems and implement solutions also increased because highly skilled people from those groups populated the committees, task forces, and advisory groups that

## **The lessons of Montgomery County**

**Lesson #1.** Implement common, rigorous standards with differentiated resources and instruction.

**Lesson #2.** Apply “value chain” thinking to the K-12 continuum.

**Lesson #3.** Blur the lines between the traditional roles and responsibilities of the school board, leadership team, principals, teachers, and parents.

**Lesson #4.** Create systems and structures that reinforce the behaviors necessary for success, and changes in beliefs will follow.

**Lesson #5.** Confront the effects that beliefs about race and achievement have on student performance and help teachers and students apply this knowledge to their day-to-day work in classrooms.

**Lesson #6.** Lead for equity.

important stages over the years. Weast describes this as watching where people walk and then pouring the sidewalk there. Even though an *Education Week* study showed that MCPS had the highest graduation rate among the nation’s 50 largest districts, gaps in graduation rates among students of different races were not shrinking. Making the Seven Keys more rigorous than the Pathway was one way of addressing this. For instance, where the Pathway suggested “proficient” scores in reading and math at certain grades, the Seven Keys recommends scoring at the “advanced” level. Seven Keys also includes more aggressive benchmarks for Advanced Placement course performance and a higher SAT target. Increasing the rigor at steps on the way to graduating ready for college prompted another overhaul of professional development to better equip teachers to help students meet the bench-

planned the implementation of the differentiation strategy. When Weast arrived, board members rarely agreed — in fact, the dynamics had so degenerated that a number of members were no longer speaking to each other. The three employee unions were at odds with each other and the district. Over time, the presidents of the unions accepted Weast's invitation to join the district's senior managers to form a cabinet that worked together on overall strategy questions. His willingness to blur the lines rather than consolidate power to himself was a first step, and stakeholder groups reciprocated by deeply engaging in the reform efforts. That's not to say there has been no organized opposition to the district's reform efforts. As the district changed special education and gifted and talented policies that often sorted low-income and minority children away from challenging content, some parents who felt their children were well served by the old policies became more vocal and began to exert pressure on various committees and board members. Nevertheless, the elected school board has remained committed to the excellence and equity strategy for 10 years, even though only one member remains from the board that hired Weast in 1999.

**Lesson #4. Create systems and structures that reinforce the behaviors necessary for success, and changes in beliefs will follow.**

Educators talk frequently about school culture and its importance for learning. These conversations are usually about how to change a dysfunctional culture so that it better serves students. In some ways, it is the holy grail: "If only we could change the culture of schooling, then we could. . . ." Culture is simply the aggregate beliefs and behaviors of the people in an organization, whether a school, a department, or a district. MCPS senior leaders knew the culture needed to shift, but where to start? Beliefs or behaviors?

The team's early communication and messaging efforts signaled the organizational beliefs that would lead to breaking the link between race, class, and achievement. Memos and meeting agendas reinforced such beliefs as high expectations, effort-based intelligence, and a relentless focus on using data to help students meet standards. But how might people who don't already share those beliefs change quickly enough to rapidly increase student performance?

The answer in MCPS was to build systems and structures that required people to behave as if every student could master rigorous content, whether they believed it or not. These included accountability mechanisms, data analysis protocols, technology tools, and forums for sharing best practices. There

is evidence in MCPS that, when these behaviors produced results, many (but perhaps not all) beliefs followed. Weast reflected on this idea, saying, "I thought I would enter the change process through the culture door and then engage everyone in creating systems and structures that would support the culture. But I couldn't get traction, so we started to build the systems anyway, and it seemed that the culture started to shift as people saw that the changes worked for kids."

**MCPS recognizes that effective teachers are the most important factor in helping all students meet or exceed rigorous academic standards.**

**Lesson #5. Confront the effects that beliefs about race and achievement have on student performance and help teachers and students apply this knowledge to their day-to-day work in classrooms.**

A few years into the strategy, the leadership team knew they needed to help teachers and principals develop more sophisticated skills in order to break the links between race and achievement. They also



*"I know I'm your favorite teacher, but please stop sending me 'Facebook friend' requests!"*

wanted to deepen the district's cultural commitment to excellence and equity.

After Hurricane Katrina hit New Orleans in August 2005, Weast challenged district leaders and principals attending a back-to-school meeting to confront the differences in performance of students of different races, saying, "That hurricane did something to me. . . . You and I have talked about 'raise the bar and close the gap.' . . . But you know, the one thing that struck me was how people were sorted. It just really got to me. I know it got to you. . . . It's hard to say it's not about race, isn't it?"

### **MCPS built systems and structures that required people to behave as if every student could master rigorous content – whether they believed it or not.**

Later in his talk, Weast declared, "Now I am going to get right down into the race issue, and I am going to talk about *Hispanic* and *African-American*. And if it hurts, I'm sorry. I apologize respectfully, but I am going to talk about it. You need to talk about it. You need to have that [conversation] because we are going to [work] together to destroy institutional barriers that have sorted kids for way too long."

Because they drew on a current event that was part of the national dialogue, his remarks galvanized the assembled leadership group by giving them a concrete picture of the outcomes that could result from institutional barriers and sorting mechanisms that reinforce social inequities. The leadership team faced a formidable task to develop concrete ways to put people's best intentions into action, but the speech marked a shift in the intensity and transparency with which race and ethnicity became required topics of discussion, analysis, and planning.


MCPS is creating an environment in which people are expected to discuss the impact that beliefs about race have on expectations and student learning. The district's accountability systems include explicit goals for students of different races and ethnicities. People learn protocols for discussing race productively to increase individual and team capacity to examine how their own behaviors and their beliefs are reflected in the structures of the organization and might be contributing to achievement gaps. Schools organize study circles in which teachers, parents, and students read and discuss research on race and achievement and share their own chal-

lenges and successes. At periodic districtwide gatherings of school leaders, Weast highlights specific practices and results of teams that make progress on key achievement gap metrics. The MCPS team believes that this deeper focus will accelerate its efforts to break the link between race and achievement. In July 2009, the school board released a new strategy document that for the first time includes a bold claim: "Student outcomes shall not be predictable by race or ethnicity."

#### **Lesson #6. Lead for equity.**

Weast sees his leadership task as mobilizing the entire community to create excellence and equity for all students. He built the capacity of staff to effectively deliver a high-quality education to every child and has consistently made the case that giving all students access to rigorous content is the right thing to do morally and the smart thing to do economically. But perhaps his greatest contribution was modeling what it means to lead for equity.

The formerly dysfunctional board recommitted to equitable student learning and then stood by that commitment for 10 years — no easy task for a revolving group of elected officials. Union leaders crafted an effective process for supporting struggling members and removing underperformers so that there would be a great teacher in every classroom. In a difficult budget environment in spring 2009, union leaders proposed and passed a resolution to defer \$89 million in negotiated compensation in order to preserve investments in the strategy. Stories abound of teachers, principals, and central office staff who decided the status quo would no longer do and began to shake things up, such as the school teams that implemented gifted curricula for every student when the data showed that advanced courses were filled with white students and grade-level courses were filled with minority students. This broad-based leadership brought the other five lessons to life and changed the prospects of tens of thousands of children.

Yes, Montgomery County made data-driven decisions, engaged stakeholders, and hired great people in its efforts to provide excellence and equity for all of its students. But such pithy phrases as "hire great people" fail to capture the complexity of the work in Montgomery County. Like many districts, MCPS had plenty of great people back when there were 35-point achievement gaps. Great people thrive in healthy organizations that enlist them in the pursuit of ambitious, meaningful goals and provide them with the powerful strategies and support systems necessary to reach those goals. The six lessons explain how the leadership team in Montgomery County is doing just that. 

File Name and Bibliographic Information

**k0911chi.pdf**

**Stacey M. Childress, Six Lessons for Pursuing Excellence and Equity at Scale, Phi Delta Kappan, Vol. 91, No. 3, November 2009, pp. 13-18.**

Copyright Notice

Phi Delta Kappa International, Inc., holds copyright to this article, which may be reproduced or otherwise used only in accordance with U.S. law governing fair use. MULTIPLE copies, in print and electronic formats, may not be made or distributed without express permission from Phi Delta Kappa International, Inc. All rights reserved.

Note that photographs, artwork, advertising, and other elements to which Phi Delta Kappa does not hold copyright may have been removed from these pages.

All images included with this document are used with permission and may not be separated from this editorial content or used for any other purpose without the express written permission of the copyright holder.

Please fax permission requests to the attention of KAPPAN Permissions Editor at 812/339-0018 or e-mail permission requests to [kappan@pdkintl.org](mailto:kappan@pdkintl.org).

For further information, contact:

Phi Delta Kappa International, Inc.  
408 N. Union St.  
Bloomington, Indiana 47405-3800  
812/339-1156 Phone  
800/766-1156 Tollfree  
812/339-0018 Fax

<http://www.pdkintl.org>

Find more articles using PDK's Publication Archives Search at

<http://www.pdkintl.org/search.htm>.