

Fairfax County School Board
Operational Expectations Monitoring Report
A = acceptable condition U = unacceptable condition

RELATIONSHIP WITH THE BOARD

Period covered: July 2008—June 2009

The Board values a harmonious and positive relationship with the Superintendent characterized by excellent communication, mutual respect, personal ethics, and professional integrity and guidance. To assure this result, the Superintendent will:

1. Maintain an ethical and harmonious working relationship with the entire Board. The Superintendent will:

- **treat all members impartially.**
- **refrain from criticism of individual members.**
- **respond to Board concerns in a timely and courteous manner.**
- **communicate immediately and directly with the Board or individual Board members when an honest difference of opinion exists.**
- **promote a positive relationship in Board meetings.**

Superintendent: A U
School Board: A U

Reasonable Interpretation: A harmonious and positive relationship exists when all parties proactively share information, and have clearly established roles and responsibilities. Demonstrating professional integrity and guidance means that all communications and recommendations to the School Board (SB) will be based on analysis of known information and will incorporate the professional judgment of the Superintendent and staff. Timely response to board concerns means quickly acknowledging the concern exists and developing a response within a reasonable time period. Immediate and direct communication means that no unreasonable time will lapse between knowledge of key information and its dissemination to the entire Board. Honest differences of opinion may occur as we establish and interpret policy, but should always be shared as such. Positive relationships in Board meetings mean all parties will be treated with courtesy and respect.

Indicators:

- Semi-annual feedback from the SB members (SBMs) in a closed meeting.
- Semi-annual feedback from the Superintendent to the Board in a closed meeting.

Superintendent Statement of Condition:

This past year, the Superintendent met with the SB in closed meeting on April 14 to discuss his own performance and that of his senior staff. In addition, the SB had a closed meeting on April 23 without the Superintendent present to discuss its own performance against expectations outlined in the Strategic Governance Manual.

The area of critical need identified by the SB was communication planning to be more proactive on rapidly emerging issues. With senior staff, the challenge is to provide SBMs with key information prior to that information being out in the community. This is a challenge that continues to be exacerbated by the ubiquitous presence of mass communication tools in the community. The traditional management of the media is now secondary to staying abreast of emerging issues in the community, blogs by those who feel disenfranchised by the school system, national activist groups that seek local school systems to promote their own agenda, and vendors seeking to intervene in legal purchasing processes.

From the Superintendent's perspective, the SB has become more cohesive on some issues, particularly if given the time and direction to debate core values pertinent to an issue. Establishing budget priorities in September has benefited the entire budget process allowing the SB to speak with one voice to the community. The Superintendent believes more work needs to be done by the SB to articulate core values/beliefs on key issues and to become more proactive in articulating those beliefs prior to making decisions. Examples during the past year where the SB could have been more proactive include: bell schedules, grading scales, and comprehensive facility planning.

Finally, the SB might do well to discuss and agree upon the expectations of its own leaders. Those who have been chairs and vice chairs readily understand the difficulty in leading SBMs into consensus decisions. The balance between being individual, independent decision makers and acting as a single body leading the school district is difficult. This difficulty is exacerbated when members take on more of a reactive role than that of a school system leader. Research notes that the more a SB can act and lead as a single entity aligned with the Superintendent and Leadership Team, the more successful the school district. This issue is an excellent topic for retreat discussion.

Board Comments:

- The Board generally supported the Superintendent's comments.
- The Superintendent's demeanor is very positive, even when being critically challenged on a difficult issue.
- The Board urges the Superintendent to summarize issues and "his sense of the Board" sooner, when possible, to identify his view of the next steps and potentially bring the Board to consensus sooner.
- The Superintendent refrains from personalizing issues relative to Board members and seeks to address differences with members individually.

2. Keep the Board informed on issues, needs, policies, and operation of the school system and:

- **offer professional advice to the Board with appropriate recommendations based on thorough study and analysis supported by ample information, including assessment of alternatives, to enable Board members to make informed decisions.**

Superintendent: A U
School Board: A U

Reasonable Interpretation: The Superintendent will use a variety of communication devices to keep the School Board informed. Some issues are very time-sensitive and will require greater frequency of communication, while others have much less urgency but will still be important for the SB or school system. The term “issues” incorporates educational trends, potential community interests, ongoing and future major initiatives of the school system or community, and newsworthy events in the community. Professional advice and appropriate recommendations incorporates educational practices, research (if it exists), community expectations, Board values and goals, and prior related policies and practices.

Indicators: The Superintendent will use:

- Friday Memos.
- Quarterly updates of major initiatives.
- Staff analysis of all SB agenda items including background information, policy questions, analysis of options, and recommended action.
- Crisis/serious incident communication.
- Debriefing of Board meetings.

Superintendent Statement of Condition:

The Friday Memos continue to be an effective communication tool addressing current and future issues. Including more information from Leadership Team members has decreased information requests from the School Board. In fact, as you will see in Operational Expectation 3, we continue to see a sharp decrease in the need for traditional memos and “From the Desk Of” (FDO) memos. We have also maintained an index and guide to the Friday memos that are accessible to members (See Appendix 1 – Friday Memo Guide and Index).

Quarterly updates have been replaced by periodic Project Management updates. The projects are developed to meet SB goals, but many have been delayed due to budget constraints.

Staff and the Governance Committee have continued to refine the information presented in SB agenda items. The most recent revision (that will begin next school year) explicitly references the SB Goal, Operational Expectation, or legal requirement related to the agenda item.

On several issues, the Superintendent created meetings with individual or pairs of SBMs to discuss and gain insights of policy direction from the SB. This past year, topics for these meetings/discussions included communication needs, GAC II, grading scales and weights, and bus schedules. Chair and Vice Chair follow-up on these issues then helps the SB gain alignment on policy direction to be given to staff.

The School Board itself has continued to take responsibility for debriefing after meetings with the Superintendent and Deputy Superintendent. This past year, the analysis has become richer at times and has resulted in greater SB efficiencies in policy decisions. The difficulty of the self debrief is not getting a detached perspective that may provide greater objective feedback.

An area where we have lost efficiencies is in the issuing of press releases. We have evolved into having, at times, multiple SBMs reviewing press releases before they are sent. The consequence is that press releases are no longer used by the press because they are not timely for their deadlines. We should analyze this situation and determine agreed upon protocols.

Board Comments

- Friday memos are worthwhile and timely.
- Meeting with individual SBMs on issues of importance should continue.
- Board members should alert the Superintendent to issues which are being raised in the community which may not have been raised at the Superintendent level.
- The Superintendent should intervene when it appears the SB is getting off track.
- The Superintendent should take a more active role in the post-Board meeting debriefing process by sharing his perspectives.
- The Superintendent needs to develop and consistently use a template for issues analysis, presentation, alternatives available and management to provide a more consistent framework for addressing issues.
- The Superintendent should provide systemic and fiscal impact of proposed Board decisions.

3. Encourage communication and cooperation between Board members and staff members so as to be responsive to concerns of Board members.

Superintendent: A U
School Board: A U

Reasonable Interpretation: The Superintendent and Leadership Team are responsible for providing the SB with information necessary to perform the duties established in the Strategic Governance Manual, and the SB is responsible for seeking such information in a manner consistent with the adopted roles and responsibilities. Cooperation means all parties are knowledgeable of their respective roles and all can self-monitor alignment with the spirit and intent of those roles.

Indicators: To efficiently handle SB concerns/requests, the following will be used:

- Report on response time for Levels II and III SB inquiries.
- Solicitation of feedback from the SB and Leadership Team about this expectation.

Superintendent Statement of Condition:

The Board's Strategic Governance Manual describes a tiered process to handle information requests from the Board. Level I requests go directly to the Leadership Team member for a quick response. An inquiry requiring a more extensive response is elevated to Level II. Level II responses come in the form of "From the Desk of" or FDO memos. Level III are requests for information from SB members that get referred to work sessions.

We have seen a sharp increase in the Level I inquiries where SBM go directly to the LT member for quick answers, mostly via email. We have seen a sharp decrease in Level II inquiries, presumably because of direct emails, information in Friday Memos and regularly updated information on the website.

Level II Inquiries

2006	2007	2008	2009
133	58	43	12

Response time for most of the inquiries was less than two weeks. Eight requests were responded to within seven days. Three were within two weeks. One response took more than two weeks (16 days). This shows a marked improvement over last year. Our performance target is two weeks and only one inquiry exceeded that this year. Last year, nearly half of the inquiries did not meet the target. (See Appendix 2 – Level II Communication)

A Level III communication inquiry include requests for information from SBM that are placed on the forum to see if there is interest in doing a work session (See Appendix 3 – Level III Communication).

Board Comments:

- The Superintendent should summarize his interpretation of the Board’s intentions or directions and confirm when there appears to be doubt or a mixed message.
- Board members are generally pleased with the access to and responsiveness of Leadership Team members.

4. Interpret, implement, and support Board policy to staff members and the public, including the implementation of Board priorities (goals) in budget planning and in all operational areas defined and monitored by the Board.

Superintendent:	A	<input checked="" type="checkbox"/>	U	<input type="checkbox"/>
School Board:	A	<input checked="" type="checkbox"/>	U	<input type="checkbox"/>

Reasonable Interpretation: Interpretation, implementation, and support mean the Superintendent will develop reasonable interpretations of Board policy and will convey those interpretations to employees and external stakeholders. Implementation of priorities means to establish action plans for all student achievement goal components, as well as establishing annual work plans for those responsible for the areas of operation specified herein.

Indicators: The Superintendent will issue:

- Monitoring reports on all operational expectations at least annually.
- Multi-year action plans and performance expectations for all student achievement goals.
- Cover goals and priorities in the Budget Operational Expectations.

Superintendent Statement of Condition:

The quality of the Monitoring Reports for both the Student Achievement Goals and the Operational Expectations were much higher this past year. Staff has now internalized the requirements imbedded in the Monitoring Reports and has organized staff functions based on the indicators within each of the Monitoring Reports. A very explicit example of this was the reorganization of both Instructional Services and Special Services around the contents of the Monitoring Reports.

The process of continually improving the SB's expectation stated in the SAGs and OEs and the subsequent Monitoring Report is now established and part of the normal work processes within FCPS (See Appendix 4 – Department MR Executive Summaries). Processes for the Student Achievement Goals, in addition to the improvement processes established for the Operational Expectations, is also well established (See Appendix 5 – SAG Summaries).

This year, the budget was built quite directly around the Student Achievement Goals and Operational Expectations. We began the budget process by having the SB develop a prioritized list of criteria against which final budget decision would be made. This early identification has driven budget deliberations by the Leadership Team and has helped focus comments from staff and the community. (Final budget adoption has yet to occur.)

That being said, the SB is well aware that we continue to lack resources necessary to implement Full Day Kindergarten and FLES in all our elementary schools as well as to meet all the Operational Expectations (technology and preventative maintenance being the largest shortfalls).

Board Comments:

- The budget process for this year was very good. Employee group and community member comments about the new budget dialogue meetings were positive.
- The Program Review Committee (PRC) process undertaken this year was effective, but the link was not made back to the Board's previously established values and criteria.
- Monitoring reports are becoming more robust.
- Clearer outcomes, expectations, and standards are needed for program redesign.
- The Superintendent should ensure a stronger process for communicating with key stakeholder communities about major changes, especially regarding the budget next year.

5. Interpret needs of school personnel and students to the Board and:

- **keep Board members informed of personnel problems and methods used to solve problems.**

Superintendent:	A	<input checked="" type="checkbox"/>	U	<input type="checkbox"/>
School Board:	A	<input checked="" type="checkbox"/>	U	<input type="checkbox"/>

Reasonable Interpretation: The Board has adopted Operational Expectations for all support functions. Within many of these Operational Expectations, there are multiple sources of information about staff and students. The Superintendent should be able to

synthesize the needs of both staff and students as expressed in the various Operational Expectations.

The Superintendent is ultimately responsible for the supervision, evaluation, and orderly work of more than 22,000 persons. While the School Board does not supervise these employees, the School Board should be aware of personnel issues that may impact the Superintendent's ability to meet performance expectations, that may impact the performance or well being students and staff, or that may have an impact in the community.

Indicators:

- Report annually the summary of the needs of school personnel and students.
- The Superintendent, in closed meetings, will discuss personnel problems and the methods being used to remedy those problems.
- The School Board will be informed of any personnel issue prior to any statements being released to the media.

Superintendent Statement of Condition:

The following represents the critical components I believe that must be considered as the School Board and Superintendent move forward to lead the system:

- During the first part of the next school year, central office staff and school based staff will need to make work load/priority adjustments with 800 fewer positions than would be expected under normal budget circumstances.
- School staff will expect us identify and stipulate the most important work over the next several years and to make those stipulations well known within and outside the organization.
- Employees will be looking closely for FCPS to plan to give salary steps/increments and may be expecting some COLA increase as recognition of the 'belt tightening' for this coming fiscal year.
- Leadership Team will need to re-create its 'team' due to the larger than normal turnover of senior staff.
- Students will be seeking greater use of technology for just in time learning opportunities. The use of IPod-like devices will increase and the use of on-line learning and on-line tools will be expected.
- Now that the Goals and OEs are part of the system, we will need to devote more time and public attention to the strategic actions necessary to continue progress toward attainment of those goals and expectations.
- Need to complete identification of best instructional practices and operationalizing in all schools over the next year.

Board Comments:

- The Superintendent shares information on a timely basis with the Board and his communications with the Board are generally effective.

Summary Statement of the Board:

The School Board voted to accept the Monitoring Report for Relationship with the Board at the June 8, 2009, work session as follows:

Mrs. Wilson moved, and Mr. Storck seconded, that the School Board accept the Relationship with the Board Operational Expectations Monitoring Report and find that each indicator is acceptable and further commended the Superintendent for his exemplary report.

Areas for Improvement:

- While improvement is noted, the budget needs to be more closely linked to our student achievement goals.
- The Superintendent should increase his outreach to individual Board members and invest the time to understand the positions and concerns of each, which will enhance the Superintendent's ability to be more collaborative with the full Board.

Areas of Commendation:

- The Superintendent's ability to remain composed, be collaborative with the Board, and not personalize issues is a major asset in the Board's work and success. His work and introduction of new decision-making tools has helped the Board reach consensus on difficult issues.

Date for Re-Monitoring: June 2010