



CASE STUDY

Boston Public Schools (MA): Growing Leadership, Improving Quality, and Reducing Costs

by Nicholas P. Morgan

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Boston Public Schools: *Growing Leadership, Improving Quality, and Reducing Costs*

As Andy Horgan made his way home from work on a Friday afternoon in the winter of 2009, he could not help but smile at the progress he had made that week. His team, responsible for IT infrastructure at Boston Public Schools (BPS), was successfully building an innovative system for protecting the thousands of gigabytes of data saved onto computers each week by BPS teachers and students.

| NICHOLAS P. MORGAN

Emily Bowen and Amy Sessler Powell contributed to the research and writing of this case study.

During his decade in the district, Horgan had often worried about the safety of data at the district's schools. There had never been a system for safely backing up or providing security for the system's servers. Recently, after a failed attempt to recover a crashed server, Horgan had had to explain to a desperate principal that the school's saved grades, personnel files, college applications, and student work were simply lost forever.

But now, as part of *The Boston Public Schools Management Institute*, a 15-week leadership development program for operations managers at the BPS central office, Horgan was working on innovative ways to solve this data problem. As Horgan drove home that day, he was confident that servers in 50 schools across the city were successfully running the backup protocol implemented by his team. Now, he wondered how quickly this program could be expanded to protect data at all 135 district schools.

The BPS Management Institute: Delivering Results while Developing Leaders

In the summer of 2009, Boston Public Schools decided to invest in the often overlooked area of leadership

Key Facts: Boston Public Schools

- Student population: 56,340 students
- Total staff: 9,023
- Teachers: 4,671
- Schools: 135
- Budget (FY2010): \$817.1 million
- Average per pupil expenditure: \$11,755 (FY2009)
- English Language Learners: 24,140
- Special education enrollment: 11,520

development for operations managers in the central office. In partnership with the District Management Council (DMC), BPS established *The Boston Public Schools Management Institute*, a leadership development program to build management capacity while realizing short-term performance improvements for the district.

With mounting pressure for improved academic performance in the face of dwindling resources, building leadership capacity is more important than ever. The theory of change is that increased managerial capacity will drive greater operational efficiency, which will, in turn, allow the district to focus its resources more effectively on direct drivers of student achievement (Figure 1).



A cohort from the Boston Public Schools Management Institute

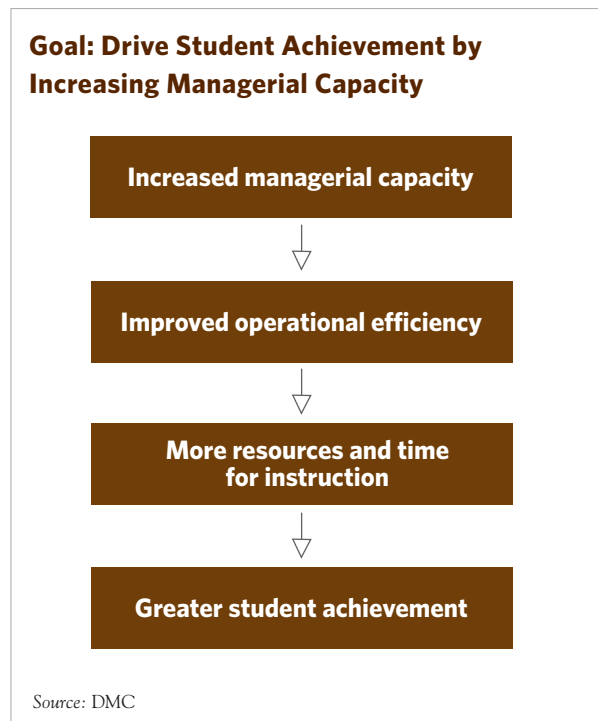
The Management Institute

The Management Institute is structured around the core belief that the best way to develop leaders is not to teach leadership and hope for the best, but rather to ask people to lead projects and achieve real performance results. At the Management Institute, each participant works on a performance challenge for which they can show measurable results in the 15-week period of the program. Formal leadership curriculum is delivered just-in-time for results, as opposed to being at the center of the leadership training. Executive coaching and cross-functional peer group support are critical to moving the process along and keeping a focus on achieving results. The specificity of the performance challenge provides an opportunity for the exchange of tangible ideas and real discussion about organizational barriers and the management skills needed to achieve results in context. (For more information about this approach, please see *The District Management Journal* v. 1, “Delivering Results, Developing Leaders” by Douglas K. Smith and Charles Baum, which discusses their theory of a performance-driven approach to building leadership capacity.) (Figure 2)

Step 1: Setting the Challenge and Going Public

The focal point of the Management Institute is each participant’s selection of a performance challenge—

FIGURE 1



a specific, measurable goal related to the manager’s job function and to the priorities of the district. Too often, tasks are completed only when they are urgent. The Management Institute asks participants to examine priority-setting, and encourages managers to think ▷

FIGURE 2



about directing their energies towards objectives that are important as opposed to only dealing with emergencies (Figure 3).

Participants are taught to focus their challenges on performance outcomes (e.g. cost savings, operational efficiencies, service quality improvements, student achievement increases) rather than activities that are not results-oriented (e.g. creating plans, conducting assessments, making recommendations). Each participant is asked to carefully select and articulate a challenge that is "SMART" (Specific, Measurable, Aggressive yet Achievable, Relevant, and Time-Bound) (Figure 4).

Inspiration for Horgan's performance challenge stemmed from the difficult conversation Horgan had had with a Boston school principal after the failed attempt to recover a crashed server. Horgan had often worried about the safety of data at the district's schools, but urgent requests and emergencies always seemed to consume the bulk of Horgan's time. And, with 135

FIGURE 3

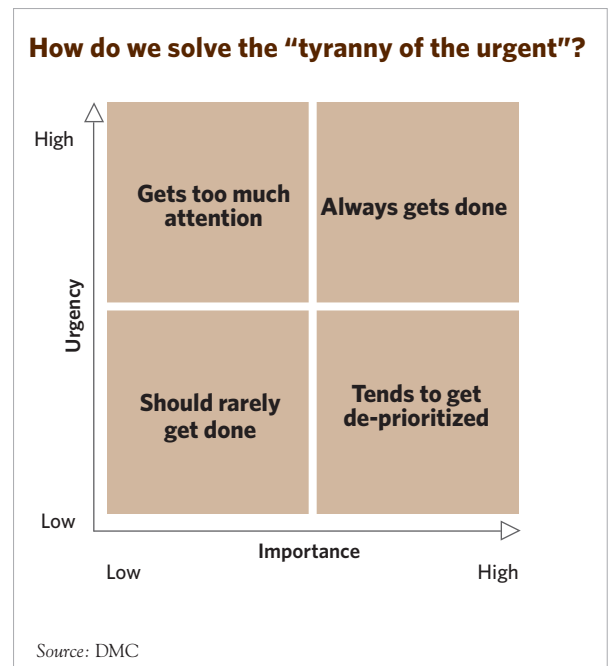
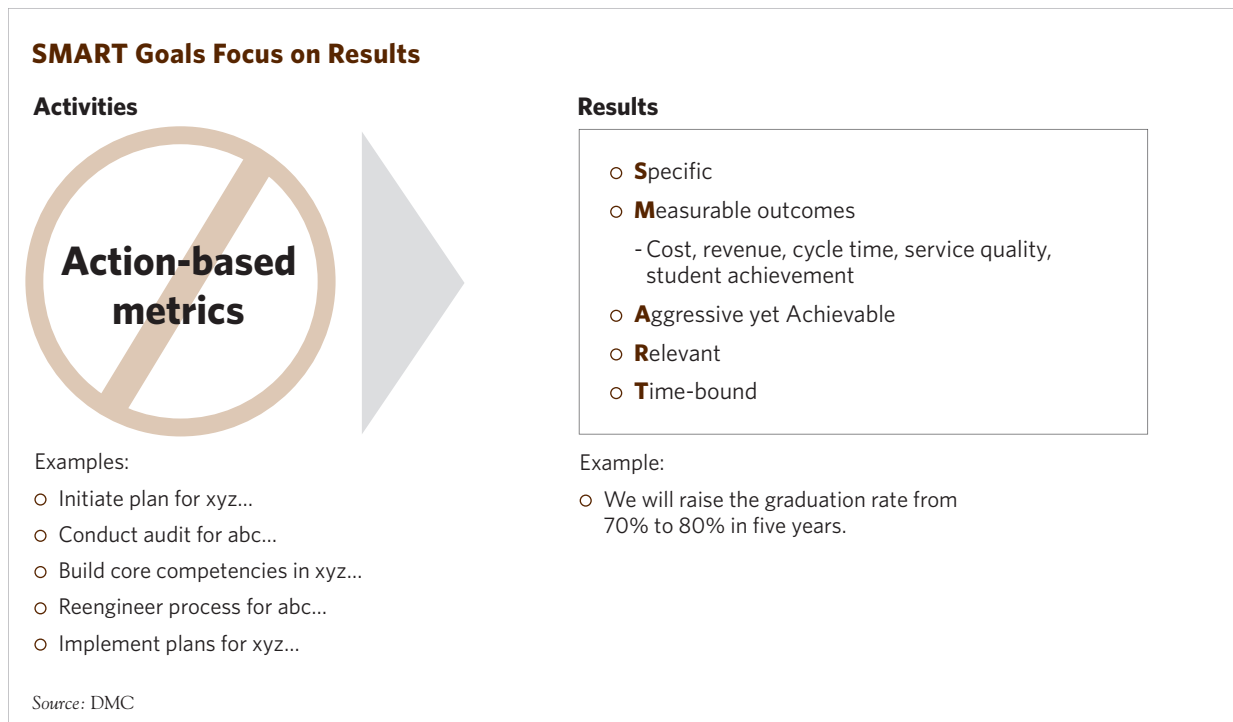


FIGURE 4



schools in the district and a good deal of outdated equipment, addressing the safety of the data was not a problem that could easily be solved.

With the help of a DMC executive coach and his boss, Horgan was encouraged to tackle this issue—an issue that was highly important, but not highly urgent until a server crashed and created an emergency. The Management Institute encouraged Horgan to start with an achievable goal. Horgan committed to the performance challenge of taking ten schools and configuring their server backups to run on a routine basis over 15 weeks. He also set the long-term goal of expanding the process to all of BPS' 135 schools.

After developing the challenge, Horgan needed to “go public”—a critical part of the process as defined by the Management Institute. He presented his performance challenge in front of 90 operations managers at a monthly managers' meeting as well as to the 60-person IT department. “I went public in the [managers' monthly] meeting and I was scared stiff,” said Horgan. “It was an important step. The challenge was now real and it was not going away. I would have to do it.”

Looking back, Horgan sees going public with his performance challenge as an important turning point. It not only made him accountable to the entire department, but

it also rallied the department in support of his effort. “My challenge was difficult and we succeeded,” said Horgan. “I cannot say enough about the team members who supported me. They were more than willing to help to ensure that the [performance challenge] was achieved.”

Horgan's coach, Margo Kelly, praised Horgan for his dedication to making the challenge work and for enlisting the help of his colleagues. “Andy brought his whole



Andy Horgan, Infrastructure Manager, Office of Instructional & Informational Technology, Boston Public Schools.

team along with him from the beginning. They were all invested in achieving his challenge, and when something went wrong, they all put their heads together and figured it out,” said Kelly.

Step 2: Achieving Early Wins

Pursuing early wins is an essential design component in the Management Institute process. Early wins create the positive momentum that is so important to ultimate success. Two different types of early wins can be pursued and achieved, and both help build confidence and energy toward achieving the larger performance challenge. “Process wins” recognize the achievement of a process step or an activity, whereas “outcome wins” indicate achievement on a performance metric. Built into Horgan’s performance challenge were a series of these smaller process and outcome wins. A process win was to hold a series of meetings with key stakeholders. One “outcome win” was to back up the very first school. Another outcome win was ensuring that good, retrievable data existed on the backup servers. A series of early wins helped Horgan build the broader momentum that led to success on the larger performance challenge.

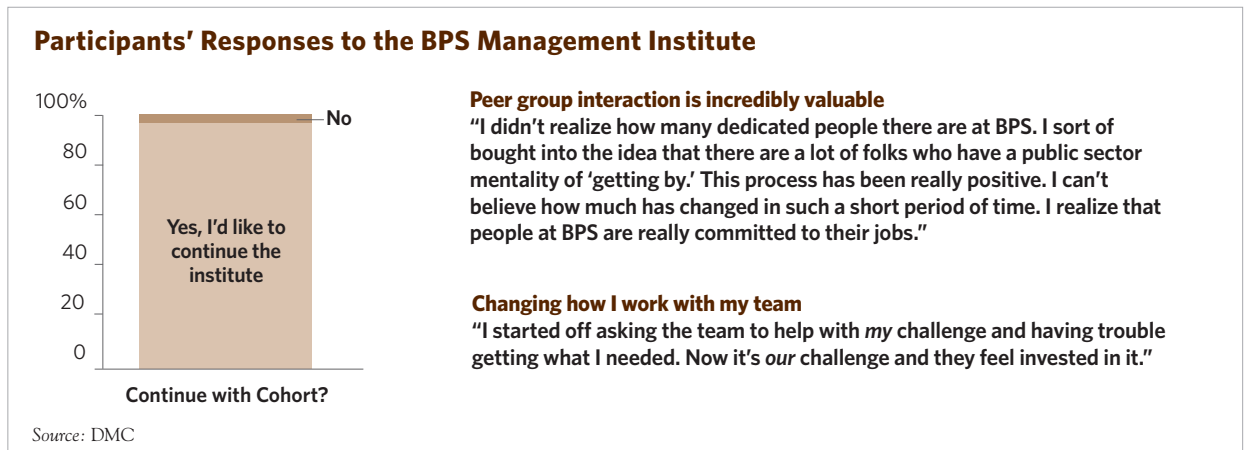
Step 3: Leveraging Support

The Management Institute strives to utilize the cross-functional network of your organization to increase efficiency. At the BPS Management Institute, Horgan was part of a nine-member peer group within

the cohort of 25 central office managers going through the 15-week program. Virtually none of the peer group members knew each other prior to participating in the Management Institute. At first, Horgan felt unsure about working with people from other departments, but quickly realized that he had only encountered these individuals under circumstances of duress: a broken computer in the finance department or network issues in human resources. With the peer group, these individuals bonded over their shared understanding of the school system culture and their hope of becoming more productive in their own roles. These commonalities enabled them to help each other in fulfilling their performance challenges (Figure 5). “One of the most powerful things was the peer group as it developed,” observed Coach Margo Kelly. “At first, no one was terribly clear about the value of the peer group and why it would be a valuable element of the program. But then, they started to reach out across boundaries in a pretty siloed system, and realized they could help each other.”

The peer group provided support for each other’s challenges and taught the group that they can rely on individuals from other departments to succeed in achieving results. During monthly meetings with the peer group, Horgan used his group as a support and a resource to vet his ideas. And Horgan was able to help others in his peer group. For example, Lisa Patrick, assistant director for adult education at BPS, had a performance challenge of improving performance on a test she administered to her students. Horgan showed Patrick how to set up and populate a wiki (a website

FIGURE 5





DMC's Garrett Smith leads a session of the BPS Management Institute.

that allows the easy creation and editing of content on linked web pages) with information and instructional documents that would be helpful to the students and teachers in the program. Having the same information available to both students and teachers from any computer helped facilitate Patrick's challenge and she received positive feedback from the teachers. The experience proved to Horgan and Patrick the effectiveness of sharing expertise across departmental lines.

The peer group, all members of the central office, also worked with each other to better understand influence-mapping, a professional development tool used in the Management Institute to analyze and target people who could have influence over a project. For example, if Horgan needs something from Person A, he might have success by approaching Person B who has influence over Person A. Influence-mapping is used to understand how decisions really are made in an organization, beyond the formal structure that is laid out in an organization chart.

Using both the influence-mapping and the relationship formed from the peer group, Horgan and his colleague from the BPS Office of Finance, Seth Racine, made plans to work together in the future. In the coming months, Horgan hopes to obtain a storage

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area network (SAN), a \$10,000 piece of equipment, to meet the data storage needs of the school system. “In the past, I probably would have just gone to Kim (Kim Rice, the chief information officer at BPS) and said, ‘We need a SAN to do this.’ Then, she would have gone to the CFO with the request,” said Horgan. “Now, I will do it completely differently. I will meet with Seth and he can help me put a presentation together using his expertise with the budget process and my knowledge ▶

of relevant facts and anecdotes like losing the data at Fenway High School. I will then call the meeting myself and invite Kim and the CFO [to make my case].”

Step 4: Achieving Results

Realizing that tackling all 135 schools at the same time would be impossible, Horgan and his coach had focused his performance challenge on ten schools. Horgan first chose five smaller schools, which he thought would be easier test cases than larger schools with more complex systems. His hope was to perfect the process at these schools with the intention of moving on to the more complex schools after the process had been developed and implemented successfully.

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Not surprisingly, the first school was the hardest, but Horgan enlisted the help of his team in making this backup a reality. “It took two weeks to figure out how to back up the first school and then make sure the data was both retrievable and good,” said Horgan.

Horgan’s team was creative in finding ways to make the initiative work, and then even more creative in finding ways to increase the impact of the initiative. For example, one team member found old servers to use; another team member designed the tool to make the backups work remotely; and a third team member re-developed the system when it failed in the first test run.

By the end of December, Horgan had backed up 41 schools, far exceeding the original definition of success

in the performance challenge. In the eleventh week of the Management Institute, the server at Brighton High School crashed. However, because it was backed up, Horgan restored 100% of Brighton High’s data in one day. His early wins inspired Horgan to expand his initiative. The only cost for this particular challenge was time, but the savings were immeasurable in terms of the value to the schools.

Data Disaster at Fenway High School

One incident in December proved the value of the initiative, but also revealed how much work remained for Horgan’s team. Over the weekend of December 5, 2009, the servers failed at both Hurley Elementary School and Fenway High School. Whereas Hurley Elementary School had been one of Horgan’s original ten schools and had had its data backed up just days earlier, Fenway High had not been included in the performance challenge and, as a result, none of the data could be recovered by Horgan’s team.

While the recovery of Hurley’s data was a huge win, the Fenway High data loss was a big hit to Horgan. A pilot high school with 290 students, Fenway High lost all of its students’ college recommendations, donor records from their private foundation, and a ten-year database on past and present students. “I lose sleep just thinking about it, about the randomness of it. Why didn’t I choose Fenway to back up?” Horgan asked himself. “I chose this performance challenge because I did not want to have to speak to another principal about data loss, but now I had to [face my fear].”

The Institute trainings on Managing Meetings, Having Difficult Conversations, and Communications Skills all gave Horgan new tools to approach these conversations in a new way. After meeting with the principal at Fenway High, Horgan said, “I’m sure the principal was upset, but she wasn’t yelling at us, and I thought maybe I had learned how to get better at this.”

Horgan and members of his peer group brainstormed about how to use the Fenway example to inform future decisions. They decided that Fenway’s data loss provided Horgan an opportunity to make the case for adequate equipment to ensure that data loss became a thing of the past in the Boston Public Schools’ system.

Step 5: Looking to the Next Performance Challenge

By going public early with his plan and by seeking the support of his peers, Horgan not only met his performance challenge of backing up ten schools, he exceeded it by backing up 41 schools by the end of 2009. His success has prompted Horgan to mentor participants in future Management Institute cohorts. He has also begun planning his next performance challenge that will involve collaboration with two colleagues from his Management Institute peer group. The three managers have gone public with their objective and are working on enrolling people into the project just as they did with their original performance challenge. This type of cross-functional collaboration is a prime example of the type of cultural change achieved through the Management Institute.

“Andy has always been a guy who gets a lot of respect from his team and a guy who wants to go in and take care of problems. Now he is a better manager,” said Rice, the chief information officer at BPS and Horgan’s manager. Sharing what he learned from the Management Institute, Horgan is encouraging other members on his team to set SMART goals and use a similar approach to accomplishing performance challenges. Rice hopes that her staff will transform the entire department by setting more specific, measurable goals to support the five-year plan of the Boston Public Schools. “If we are always focused on fighting fires, we will never get there. I am asking everyone here for one performance challenge and with one, we can think about process wins and measurable goals and influence mapping. We are trying to incubate a safe environment to learn,” said Rice.

Among the 50 participants who have completed the program at BPS thus far, some remarkable achievements have been accomplished. One initiative generated \$300,000 in additional annual revenue by increasing breakfast participation in five schools; another saved \$80,000 during the timeline of the program by reducing plumbing contractor costs; and another saved \$28,000 on an annualized basis by reducing food cost. Horgan and his fellow Management Institute alumni believe this kind of leadership development training will have a lasting effect on their work. Horgan points to the many ways that his peer group of nine was able to help each other with their challenges and will be able to

assist each other with future initiatives. The support and the success experienced prompt a contagious enthusiasm for mastering performance challenges.

The BPS Management Institute will ultimately train approximately 100 managers, drawn from a broad array of functional areas within BPS. This group will be divided into four cohorts.

Conclusion

In these challenging times when districts are under pressure to achieve ever more in terms of academic performance with dwindling resources, the District Management Council firmly believes that growing management capacity holds great potential for increasing district effectiveness. As inspiring, thought-provoking, and rich as some professional development programs are, it is too often too difficult to apply what is learned in the classroom to situations in the district. The Management Institute offers an opportunity to cultivate leadership skills in the context of one’s job while achieving results. As shown in this DMC Case Study, Andy Horgan was able to tackle an issue he has long wanted to resolve. By breaking it down into a more manageable and defined challenge, and by having support in the form of training, coaching, and peer collaboration, Horgan was able to have a tremendous impact on the district. Through the peer group approach, Horgan was also able to form valuable relationships that will help him be even more effective in his future endeavors. This hands-on approach to cultivating leadership and management capacity offer an opportunity for districts to leverage the talent that exists within the district while achieving measurable performance gains. □



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