

# K-12 Partnership Report

## KPR Case Study: Operation Excellence

The vast majority of business/education partnerships focus on improving student outcomes through direct or indirect engagement at the classroom or individual student level. However, there are other opportunities for engaging the business community, and for those willing to think outside the classroom, the rewards can be great.

One example comes from the Montgomery County Business Roundtable for Education (MCBRE), a nonprofit operating in Montgomery County, Maryland (north of Washington DC). One of the organization's first community/school initiatives, Operation Excellence, is an example of a nontraditional partnership model that fully leveraged the time and talents of business partners and had a dramatic influence on school, and ultimately student, outcomes.

### The origin of Operation Excellence

When Dr. Jerry Weast joined Montgomery County Public Schools (MCPS) as Superintendent in 1999, he brought with him a firm belief in the value of building strong relationships with the business community. He had seen the impact of such relationships in previous districts and immediately began reaching out to local business leaders upon his arrival in Montgomery County.

Dr. Weast was one of the local leaders who brought about the creation of MCBRE in 2000. The organization was founded, and continues to operate, as a bridge for the creation of strategic business/education partnerships, focusing on connecting classroom learning to the workplace and on improving the quality of school operations. The organization emphasizes communication and collaboration between the district and the business community: Dr. Weast sits on the board, and district officials are involved in the design and planning of major initiatives.

Within two years of the organization's founding, Michael Subin, President of the Montgomery County Council, asked the Executive Director of MCBRE to coordinate a study of targeted business operations of the district. The goal of the project, according to the Operation Excellence summary report, was "to use business acumen to identify ways of making some of the MCPS business processes more efficient and effective with the idea of re-allocating the savings to the instructional programs of MCPS, which directly benefit the children of the county."

While district leaders in some areas would be wary of such an initiative, MCPS leaders embraced the opportunity due in part to three factors:

- The Superintendent placed a priority on engaging the community, particularly on bringing business leaders into school operations as true partners.
- The project was proposed in order to increase resources flowing into instruction, not simply to reduce budgets overall.

### Operation Excellence

**Where:**

Montgomery County, Maryland

**Partner(s):**

Montgomery County Business Roundtable for Education; Montgomery County Public Schools; multiple individuals representing various businesses

**Challenge:**

Find efficiencies in district operations so that funds freed up could enhance instructional efforts

**Solution:**

MCBRE, working with MCPS and business representatives, targeted four operational areas and put together a team to study each one and provide suggestions for improvement.

**Partner Roles:**

Two community leaders, Jane Rudolph with Lockheed Martin and Larry Bowers with MCPS, led the project, identifying areas of study and working with MCBRE staff to recruit and manage partners for each team. Team members worked together for three months to analyze existing operations and make recommendations.

**Outcomes:**

The district realized several direct and indirect outcomes. They were able to rethink strategic approaches to building maintenance and cleaning and lobby for new equipment, all of which significantly reduced hiring needs in those areas. Further, acquisition of software in call center and financial operations areas improved capabilities in those areas.

Indirectly, several of the business partners continued their support for the district after the project ended, and many gained knowledge they could apply to their own work. The district, through this and other community engagement efforts, continues to build support throughout the county.

- While MCBRE was a new organization, school and community leaders had worked on a similar initiative in 1993 called the Corporate Partnership for Managerial Excellence (CPME). The majority of the recommendations of CPME had been implemented and all parties viewed it as a success.

### Project design and implementation

MCBRE selected two people to structure and lead the initiative. The first was a representative of the business community who sat on MCBRE's Board: Jane Rudolph, Vice President of Strategic Analysis and Development for Lockheed Martin. The second was Larry Bowers, Chief Operating Officer for MCPS.

Working together over the course of several weeks, these project leaders identified four operational areas to review, based in part on Bowers' analysis of where improvements could be made and efficiencies found. These included:

- Facilities management
- Financial management
- Technology management
- Baldrige certification

According to Larry Bowers, "This was a partnership that allowed businesspeople to share their expertise on the operations side of the shop. It can be difficult to involve people on the education side because for some it's not their background, but when it comes to business operations, they're extremely familiar and have a great deal to offer."

Once they had identified these target areas, Rudolph and Bowers, with the help of MCBRE staff, put together a set of strategic questions for each area, a step that helped guide their selection of business partners. Altogether, Operation Excellence recruited 25 business leaders and 13 district leaders to fulfill the goals of the project.

MCBRE recruited people based on their individual expertise, regardless of whether their companies focused primarily in the target area in question. As Jane Rudolph notes, "Lockheed Martin supported the team with people out of our financial community to help look at their financial systems. That's not normally what you would think about Lockheed Martin doing, but as we saw where their needs were, we looked across our organization to see how we could contribute to the effort. Clearly, we work with large-scale financial systems here, and we wanted to bring that experience and expertise to look at their systems to see what they might need to make them more efficient."

Once teams were assembled in each focus area, those teams were given three months to analyze current operations, review options, and make recommendations. Each team established their own structure, workflow, and meeting schedule. A kickoff was held at the County Office Building on June 18, 2003 and the results were

## Participants in Operation Excellence

*Presented by Title and Organization*

### Baldrige Management

#### MCBRE Business Partners

- Vice President, Education and Construction Services
- Vice President, Bank of America
- Professor, Corporate Learning Office, Defense Acquisition University
- President and CEO, SABU, Inc.

#### Montgomery County Schools Partner

- Coordinator, System-wide Continuous Improvement

### Facilities Management

#### MCBRE Business Partners

- Director of Business Development – Shapiro & Duncan, Inc.
- Director of Property Management – Foulger-Pratt Management, Inc.
- Executive Vice President - Complete Building Services, a Donohoe Company
- President - Pioneer Building Services, Inc., a Foulger Pratt Company
- Director of Engineering - Foulger-Pratt Management, Inc.
- Project Executive Education Construction Services - Bovis Lend Lease
- Vice President, Business Development – Sodexo

#### Montgomery County Public Schools Partners

- Director, Department of Facilities Management
- Director, Division of School Plant Operations, Department of Facilities Mgmt.
- P.E. Director, Division of Maintenance, Department of Facilities Management
- Assistant Director, Division of Maintenance, Department of Facilities Mgmt.
- Maintenance/Facilities - Randolph Area Manager
- Maintenance/Facilities – Bethesda Area Manager
- Maintenance/Facilities – Clarksburg Area Manager

### Financial Management

#### MCBRE Business Partners

- Director, Public Affairs, Comcast
- Director of Affinity-Networks Solutions, Comcast
- Senior Financial Analyst, Lockheed Martin
- President, Giacalone & Associates
- Director, Call Center Operations, Comcast
- Manager, Public Affairs, Comcast
- Group Vice President, and CIO, GEICO
- Business Operations Director, Lockheed Martin
- Finance Director, Lockheed Martin

#### Montgomery County Public School Partners

- Chief Financial Officer
- Community Partnerships Specialist

### Technology Management

#### MCBRE Business Partners

- Director of IT Academic Svcs., Montgomery College
- Public Sector Client Consultant, Hewlett-Packard
- Vice President, IBM
- Sr. BP Operations, Phillips International
- Vice President, United Communications Group

#### Montgomery County Public School Partners

- Office of Global Access Technology (OGAT), Electronic Graphics and Publishing
- OGAT Director, Information Services
- OGAT Special Assistant for Special Projects and Grants

submitted to MCBRE by the business leaders on or around September 25, 2003. The final recommendations document was made public in October of 2003 in a presentation to the Montgomery County Council.

### **Direct outcomes of Operation Excellence**

After MCPS and the County Council reviewed the partners' recommendations, they decided to put several into place; this include allocating funds from the council for needed software and equipment. Some examples highlighted by Larry Bowers include:

- The partners found that the district's financial management software, first purchased in 1983, was incapable of meeting current needs. They identified a new system with the necessary features, and the business partners successfully lobbied the County Council for the funding. "Businesspeople are influential advocates," said Bowers. "Elected officials look to business leaders for input."
- Business partners also lobbied for the purchase of equipment that allowed the district to forgo the hiring of additional building services staff.
- The partners established a different strategic approach to cleaning, going from a model with one person handling all duties within an area to a team model that moved through a facility together.
- Maintenance staff are deployed differently as a result of the team's recommendations. They have significantly reduced staff time on the road by having staff handle multiple work orders with each site visit, going to the extent of cross-training some staff members to increase their capabilities. Materials delivery models were also restructured.
- Call center operations, particularly those in the district's employees and retiree services office, were improved as well. United Healthcare was particularly helpful in giving team members a tour of their call center facility, walking them through UHC operations, helping the district choose and purchase call center software, and helping set up a center within the district office.

As a result of these and other improvements, the district has not hired any additional maintenance staff since 2003, despite adding six million square feet of facility space. (Additional staff have been hired in building services, but not at all in proportion to this growth.)

### **Indirect outcomes**

In addition to the cost savings and improvements made possible as a direct result of this campaign, the district has realized several indirect outcomes.

First, many of the business partners involved in Operation Excellence have continued to support the district and to advocate on its behalf. This has been helpful in ongoing improvement efforts and, more

broadly, in advocating for the district with the County Council and others.

While the school district was intended as the beneficiary of this project, many of the participating businesspeople reported learning a great deal through the process as well, particularly in areas such as the implementation of Six Sigma programs (used by MCPS as part of its Baldrige efforts).

Also, according to Jane Rudolph, "One thing we learned through this process is that, in a number of areas, MCPS is doing a fabulous job - there were really no efficiencies to be gained. It's good to have that kind of information about a public institution - it instills confidence on the part of businesses and others in the community."

Due in part to the openness of the district to this effort, and the respect it earned from its business partners, MCPS continues to garner support and strengthen its reputation within the community. According to Larry Bowers, the district has seen a net increase of 6,000 students coming from private institutions over the last eight years, and its market share has increased from 80% to 84% of school-aged children in that time.

And the collaborative approach the parties brought to Operation Excellence has helped MCBRE and MCPS build a strong and trusting working relationship that has allowed for additional successes over the years. According to Heather Schwager, Executive Director of MCBRE, "Since 2003, MCBRE and MCPS have worked together to support the district's efforts on project management, diversity and inclusion in the workplace, and the impact of generational differences in the education process. All of these initiatives were made possible thanks to the groundwork laid by Operation Excellence."

While business/education partnerships that call upon the professional expertise of the business community may not be common, the work of those involved in Operation Excellence shows that they can have a dramatic effect on district operations and on stakeholder relations. As district leaders work to address the challenges presented by today's economic climate, they should consider the benefits of such initiatives and approach their business partners accordingly.

## **Resource Links**

Montgomery County Business Roundtable for Education  
[www.mcbre.org](http://www.mcbre.org)

Operation Excellence Recommendations Report  
[www.mcbre.org/Library/OperationExcellenceResultsFinal.pdf](http://www.mcbre.org/Library/OperationExcellenceResultsFinal.pdf)

Montgomery County Public Schools  
[www.montgomeryschoolsmd.org](http://www.montgomeryschoolsmd.org)

Corporate Partnership for Managerial Excellence Report  
*The 1993 predecessor to Operation Excellence*  
[www.quality.org/tqmbbs/govt/cpme.txt](http://www.quality.org/tqmbbs/govt/cpme.txt)