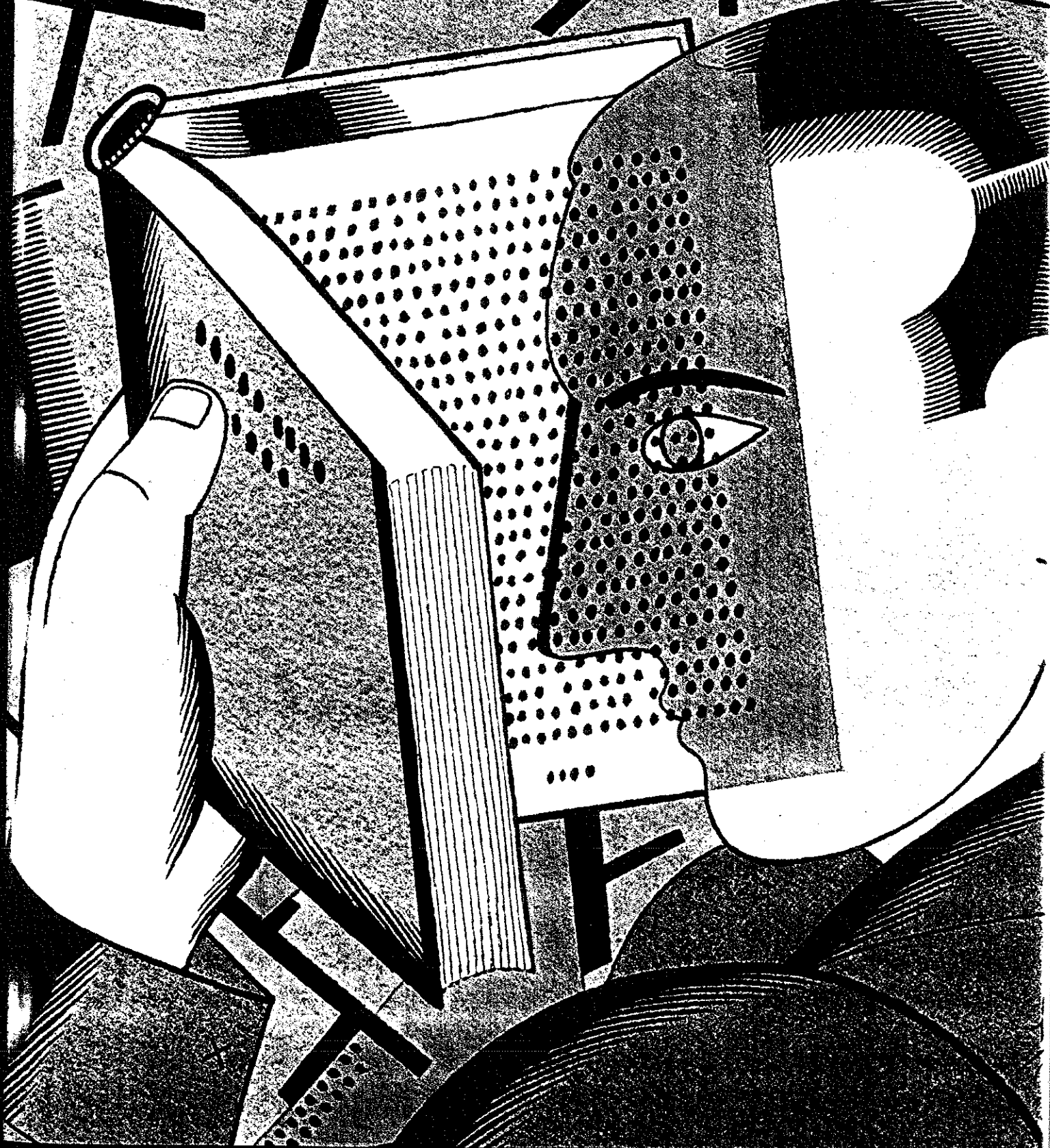


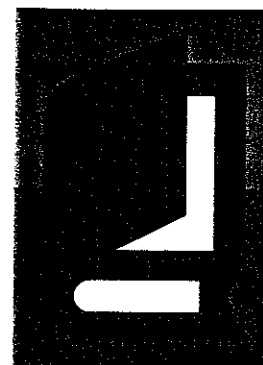
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Quality Progress



Quality in Education

Continuous Improvement in Conferences



How outcomes teams are helping national education reform

by
Scot M. Faulkner

SINCE THE HISTORIC 1983 REPORT CALLED "Nation at Risk," numerous education groups and conferences have addressed aspects of how to confront the concerns outlined in the report.¹ The report's sweeping criticism of American education states that, unless a serious full-scale effort is made to reform the way America's young people are educated, America's future as a nation and as a world power is in peril.

The report has made national education policy a favorite debate topic between opposing factions in the U.S. Congress and the federal executive branch. But while national policy is gridlocked, many practitioners at the state and local levels are working on practical ways to address the report's issues. A number of these efforts have turned into substantive, tangible successes in individual schools and school districts. Through newsletters and professional forums, word of the growing number of successes is spreading.

Key individuals in several national education groups and corporate leaders concerned about education are now looking for more focused ways to create new success stories. One challenge is how to involve teachers, officials, students, parents, and other key participants in the education system in shaping and implementing solutions.

The Texas connection

In 1992, Gov. Ann Richards of Texas saw the opportunity to turn a scheduled statewide education conference into the first of a series of four national conferences unlike any others. With the bipartisan cooperation of fellow governors, these conferences would act as a series of national town meetings, whose speakers and attendees would systematically address the issues raised in the "Nation at Risk" report using the official framework,

referred to as the National Education Goals (see Figure 1). The annual conferences would be held throughout the country. As interest and need developed, other conferences would be added.

Richards' plan also called for the formation of a coordinating group that would bring continuity to the planned conferences. This group would be composed of representatives from the sponsoring governors, the National Center for Manufacturing Science, and several corporate sponsors. The work of the group members would be distilled and synthesized by their peers and colleagues and circulated nationwide. The issues, conclusions, and action plans discussed at the conferences would be developed, passed on, and built on, one conference to the next. The objective was that, through these conferences, a national action plan for ensuring quality in education would be achieved.

Richards' vision to build a national action plan based on consensus was overly ambitious and was never fully carried out. But several significant events have resulted. Education conferences have been held in Texas, Colorado, and Minnesota; another is scheduled to be held in New Mexico in April 1995. Coordinating groups, called outcomes teams, have been formed. More important, a conference planning process has been developed to retain the focus, commitment, and institutional

Figure 1. National Education Goals by the Year 2000

1. All children in America will start school ready to learn.
2. The high school graduation rate will increase to at least 90%.
3. American students will be competent in core subjects.
4. U.S. students will be first in the world in science and mathematics achievement.
5. Every adult American will be literate and possess the skills necessary to compete in a world economy.
6. Every school in America will be safe and free of drugs.

memory of conferences' events. Through this process, conference proceedings and attendees' feedback are shared with the community at large.

The concept of the outcomes team

The outcomes team concept was born of several considerations:

1. Only a few thousand people actually attend education conferences, but thousands of others need to have the information disseminated to them.

2. Conference participants can't hear each featured speaker and attend each session because some are held concurrently.

3. Traditional formats, such as printed conference proceedings and published papers, usually do not receive the circulation, attention, and dialogue they deserve. People simply do not have the capability to read, let alone discuss, all that is presented at a given conference.

Thus, the role of the outcomes team is to stand back and capture the essence of each conference. The team members hear all speakers, attend all sessions, and listen to participants' feedback. They then communicate this information to the national education community.

The selection of team members is a critical factor because of the need for diverse perspectives and skills. Members must be able to balance their own viewpoints with objective listening. Team members need to be knowledgeable of education reform but still remain open to the multitude of new information and ideas presented at the conferences.

Another key element is commitment. Team members must remain part of the process, from one conference to the next, to retain an institutional memory of the events and conduct relevant trend analyses.

The Texas conference

Several months before the Texas education conference was held in November 1992, the selection process for the outcomes team began. More than 40 people were recruited by the conference coordinators. It is significant to note that there was no competition or call for volunteers; through peer recognition, each participant was selected based on the skills he or she would bring to the team. The coordinators mounted a major effort to identify individuals who reflected the diversity in the U.S. public education system. Such factors were considered:

- Geographic location
- Demographics (race, ethnicity, age, gender, and educational background)
- Roles in education (teacher, student, parent, administrator, and researcher)
- Philosophical viewpoints (liberal/conservative and Republican/Democrat)

An additional criterion was applied to the selection process: Those invited to become team members had to be known for their innovative thinking toward education and had to display a general openness to new ideas in their writings, work, and interaction at other education-related conferences.

The Texas conference coordinators also organized and financed a separate effort to identify, prepare, and support four students from Texas public schools to add their voices and perspectives to the team. The outcomes team members' acceptance of the students was a testimonial to the success of this effort.

Once selected, the team members were required to meet the

day before the two-day conference to get acquainted and to develop the approach they would take to achieve the conference's multiple objectives. A facilitator led the team members through a series of introductory icebreaking exercises that prepared them for more substantive sessions, including brainstorming activities to identify issues related to the six National Education Goals. Using affinity diagrams, these issues were then clustered into mutually agreed-on groupings. The team came up with about 300 issues that were ultimately clustered into 15 groupings.

Once the issues were placed in these groupings, five pre-selected facilitators each chose a grouping that they wanted to concentrate on during the conference. (The 10 groupings that weren't selected were reported as issues to be explored at other conferences.) Then each outcomes team member chose to work on one of these issues, forming a subteam. During the remainder of the preconference work session, each subteam (facilitator and four to eight members) organized itself and planned its work approach for the conference. The mandate for the subteams was to outline substantive, tangible actions (related to their particular issue groupings) that school districts and state and local governments could address.

The Texas education conference was conducted in the traditional format of offering general sessions and elective sessions. The three general sessions featured panels of noted education leaders, corporate heads, and politicians. They focused on the conference's two broad themes: how quality management relates to the National Education Goals and how to view education as a system.

The conference's eight elective sessions each had eight concurrent tracks under the following topics:

- Business and industry coalition
- Higher education
- Grades K-12 (two separate tracks)
- National initiatives
- Quality management
- State initiatives
- Teacher education

A unique dimension of the Texas conference was a computer link between attendees, the three general session panels, and the outcomes team. Using a room filled with computer terminals and support staff, conference attendees could:

- Comment on issues being focused on by the team. Since this input was processed in real time, it became part of the evolving conference proceedings and helped direct the outcomes team's discussions.
- React to comments submitted by others within the computer network. Overall, the attendees contributed more than 300 comments, some of which were several paragraphs long. In analyzing the comments, the team discovered that many comments built on others' comments. Having participants react to and build on previously entered comments helped dramatically improve and broaden the substance of the input.
- Submit questions for panels. Ninety questions for the three general session panels were submitted.
- Critique the conference and provide suggestions on how to organize and conduct future forums. Seventy-seven comments identified conference strengths, and another 99 comments identified areas for improvement.

During the Texas conference, the entire outcomes team attended all of the general sessions, but only a few members

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Figure 2. The Seven Critical Issues

1. Internal and external customers and suppliers of the education system must be identified and clarified.
2. A common vision and clear set of objectives must be developed at the national, state, district, school, and classroom levels.
3. A relevant set of performance or outcomes standards must be established for the education system, from the national level down to each classroom.
4. A commitment of resources is necessary to significantly improve the quality and amount of professional development of all persons involved in the education system. The first step in this process is to create awareness of proven total quality principles and adapt these principles to the education system.
5. For those identified social conditions that impede student learning, a process must be developed to overcome those conditions.
6. A process of continuous improvement must be implemented to significantly improve the curriculum (content material) and the culture of the school environment within the instructional delivery system (all aspects of curriculum delivery—for example, teaching methodology, school calendar, and site-based improvement).
7. Stakeholders (all persons who are customers and/or suppliers of the education system), educators, government officials, business leaders, families, and students must be convinced that restructuring of the education system is necessary to improve America's competitiveness and strengthen its social fabric.

went to several concurrent sessions and monitored computer inputs. The remainder of the team worked to develop detailed action plans for some of the issues identified during the preconference work session. Team members sat together during the general sessions and during lunch, allowing for continued dialogue and bonding. This placement, plus special badges, let the conference attendees know that a team existed to distill information and report on conference proceedings.

During the first night of the conference, the subteams worked on the first draft of their recommended policies and actions for their particular groupings. These recommendations were based on the first day's computer input and the members' input on the general session panels they attended. This evening meeting served as a midcourse reality check to refocus issues and to plan for what still needed to be learned from the second day of the conference.

On the second day, the outcomes team made its initial report to Richards, the conference chairperson, and provided notes for her presentation at the final session. At the adjournment of the conference, two tasks remained:

1. The outcomes team's senior support staff needed to write an executive overview that framed the general state of the dialogue of both the conference and the team. (This resulted in the seven critical issues outlined in Figure 2.)
2. Each subteam needed to fully develop their action plans. (This process resulted in the final report being issued 60 days

after the conference. The report was formally submitted to, adopted by, and circulated within the National Governors' Association.)

The Colorado conference

As Richards had envisioned, a second education conference was planned for November 1993 in Denver, CO. The second outcomes team had identified a number of improvement issues as the two-day conference moved into its final planning phase:

1. The outcomes report needed to be circulated to all participants, not just state governors. In addition, key education groups and education-oriented news media needed to see the report.
 2. The outcomes team should include more individuals who have the authority to commit resources to implementing the report's actions.
 3. All outcomes team members should be involved in the listening process. (In Texas, not all of the conference presentations were heard.)
 4. The outcomes team needed to build its conclusions more directly from the conference proceedings and less from its own internal dialogue.
 5. The report needed to be ready earlier to ensure a timely release of information to attendees and the education community.
- The Governor's Office in Colorado and the chairperson of the second outcomes team decided that all of these issues were valid and that steps should be taken to address them. Among the steps taken were:

1. Recruiting several national education leaders and representatives of key national and state organizations to be outcomes team members.
2. Sending a proposed agenda, set of objectives, and set of selected readings (including the Texas conference outcomes report) to team members to help them establish a common framework.
3. Committing to having every session of the Colorado conference monitored by team members and to using the preconference work session to develop clear listening strategies and guidelines.

The decision was made to avoid the lengthy affinity diagramming process used in Texas. Instead, the core leadership of the team (the chairperson/facilitator, the governor's coordinator, and the four subteam facilitators) proposed a draft structure for organizing the issues based on the Texas outcomes report and subsequent issues that arose during the Colorado planning process.

After a short icebreaker and get-acquainted exercise, the 30 members of the Colorado outcomes team discussed and adopted the proposed draft structure with a few modifications (mostly in language). The balance of the preconference session was devoted to having the subteams develop their own listening plans to capture the essence of the presentations using this issue framework:

1. *Emerging practices.* Subteam members were to note successful schools and the best practices they used so that other schools could learn from them and benchmark those practices.
2. *Meeting the challenges of implementation.* In each success story, the subteam members were to note the barriers that were cleared and how the school rose to the challenge of implementing change.
3. *Using support systems.* Since most successes happen with

the help of various external resources, subteam members were to note these support systems (e.g., a partnership with a private-sector company).

4. *Identifying current and future trends.* The education reform movement, like education itself, is evolving. Subteam members were to identify trends to lay the groundwork for issues to be addressed in future conferences.

The team concluded the preconference session by completing a grid in which individuals committed to attending specific sessions. The process resulted in all 70 sessions having at least one subteam listener. Sometimes several people attended a given presentation since it addressed the issues of more than one subteam.

Listening forms were developed so that the subteam members could easily take notes during the sessions. A master form was also developed that let members note items that might not fit their subteam focus but should be shared with the entire team. (About 20 additional key ideas were identified using this form.)

The outcomes team members spent the first night of the Colorado conference preparing subteam draft summaries based on the first 44 sessions they attended. One major revision to the "emerging practices" issue framework was the addition of a "critical practices" subsection. This reflected eight specific issues that had emerged from the sessions as keys to success in any school setting. Several other minor revisions were made to the issue framework, and since the issues became more refined, adjustments were made on which subteam should attend which session.

During the second day of the conference, the team distributed conference evaluation forms to participants. The forms were designed to identify strengths and improvements to help plan future conferences. Using these questionnaires, the Colorado conference participants provided 94 comments,

including 33 improvement suggestions.

During that day's luncheon, the outcomes team chairperson gave a brief overview of how the team worked and the initial broad issues it had identified. Team members were recognized and thanked for their contributions. Based on both the spontaneous applause and comments on the conference evaluation forms, it became evident that the conference attendees supported the concept of summarizing and synthesizing the conference proceedings.

The team met its self-imposed deadline of having the entire report, except for a brief executive summary, completed by the end of the conference. Within a week after the event, the final report—including a summary called the "Denver Doctrine" (see Figure 3)—was submitted to the governor's liaison and was ready for the printer. This time the distribution list included:

- All attendees of the Colorado conference
- All governors
- All major national education groups
- All members of ASQC's Education Division
- Selected state legislative education leaders
- Selected news media and periodical education reporters

The Minnesota conference

In the third education conference, which was held in St. Paul, MN, in April 1994, a number of additional improvements were made:

1. Students were included. (Colorado conference planners were not able to recruit students in time.)
2. More time was spent on developing the distribution and advocacy strategy for the findings of the conference and the outcomes report.
3. Evaluation forms were distributed at the beginning of the conference to maximize participant input.

Assessing the effect of the outcomes process

Did the outcomes team effort enhance the value of these education conferences? Thus far, the following observations can be made:

1. The outcomes process expanded the audience for the conferences. The Texas and Colorado conferences had a combined attendance of 2,600 people (with possibly as many as 100 attending both). Yet, the outcomes reports reached more than 6,000 people directly; indirectly, thousands more people have likely been reached, as excerpts have been reprinted, circulated, and placed on computer bulletin boards. This sizable number reflects people in all parts of the education process: parents, students, teachers, administrators, and community leaders. These national conferences could not have reached such a diverse group so quickly without the outcomes process.

2. The outcomes process enhanced the effect of other conferences. The brevity and focus of the reports have served education in a number of ways. Other conferences and forums have used the outcomes reports as discussion guides and to establish action plans for local reform efforts. The "critical practices" section of the Colorado report has become the basis for surveys and self-evaluation questionnaires for schools in several states.

3. The outcomes process has shown that conferences can build on each other. A dialogue has developed that substantively bridges from one conference to the next. There is a sense of forward momentum among education reformers. This dialogue has broadened to include other forums, most notably the Fifth Quality in Academe Conference in Utah, which was scheduled

Figure 3. The Denver Doctrine

Education has customers.

Systemwide, the customer is the nation and the student is a partner in its outcome.

In the classroom, the customer is the student.

The success of both of these customer relationships depends on the following:

- An ongoing understanding of the needs of the customer
- Identification and involvement of all participants in achieving those needs
- Continually achieving those needs requires a process, understood and accessible to all.
- This process must be measurable.
- Measurements must enlighten and link to improvement.
- All actions must continuously be reevaluated and improved in light of new information and needs.
- The process will work if mutual respect is maintained.
- Open, ongoing communication is critical to the whole.

We are all in this together.

We are together for the long term.

We must succeed.

for July 1994. The "critical elements" portion of the Colorado report was used as the framework for the conference's agenda and recruitment of speakers. Such cross-pollination of ideas and dialogue could not have happened without the outcomes process.

4. The outcomes process helped achieve the objectives of creating a national dialogue and consensus on education goals. The recently passed national legislation on education standards was approved with strong bipartisan support. Some of this bipartisanship was helped by having Republican and Democratic governors host these national conferences and by having clear bipartisanship embodied in the membership and activities of the outcomes teams.

Broadening the outcomes process

The outcomes process is helping redefine what conferences can and should be about. As conference technology evolves through the use of interactive video, computers, and satellites, so does the format, attendance, and reasons for conferences. Currently, an international effort is under way to link education practitioners from the United States and Japan. Instead of opting for a traditional one-shot conference with hundreds of people, the planning group is calling for a small gathering (15 representatives from each country) to meet face to face, with simultaneous communication links to several dozen remote sites in each country.

The format and agenda of this meeting are designed to foster an ongoing dialogue. The goal is for practitioners from both countries to continue communicating beyond the two-day conference. This will be driven by specific outcomes from the kick-off meeting. These outcomes will be communicated via computer, fax, and mail to thousands of people. Many of the people leading and organizing this United States-Japan exchange were members of the outcomes teams. Their intent is to start a process, not just hold a conference. This orientation of linking technology and processes would not have occurred without their experiences in Texas, Colorado, and Minnesota.

The outcomes process can be applied beyond the education field. Today, many professional societies, associations, and policy forums are looking for ways to broaden their audience and improve their events. The success of the outcomes process experiment in the education sector can serve as a possible model for reform.

Reference

1. "Nation at Risk," U.S. Department of Education, Washington, DC, 1983.

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