

Mike Strembitsky and site-management in Edmonton

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If you spend time around the school-site-management idea you will pretty soon hear about Edmonton, Alberta. Unfortunately, that's about it: You hear about it. You don't hear much about it, substantively. You don't find much to read about it. And you're unlikely to get to Edmonton yourself, to ask about it. So it's just another of those places where, as you hear, "they're doing it." Whatever 'it' is.

I got lucky. In November Carl Marburger invited me to sit in a small meeting in Washington. He wanted to talk about where "school-site" is at the moment: about the superintendents who claim to be doing it, and about the consultants who claim they're experts at it; about whether it's making a difference for kids, and about where it fits in the evolving national discussion about strategy for school-improvement.

He'd included Mike Strembitsky. Mike is the superintendent in Edmonton. I heard him telling others a little about his situation, at dinner the evening I got in. I asked if he'd be willing to let me do a real interview, afterward. He was.

What follows is a collection of the things Mike said that first evening and during the meeting the following day; about Edmonton and about his approach to site-management.

Edmonton is the other big city in Alberta, north of Calgary. Edmonton is a 'blue-collar' town. And a government town. It does have a lot of business employment: oil, meat, construction manufacturing, distribution. But Calgary is the corporate headquarters town. In Edmonton the majority population is not Anglo. There are a lot of people from central Europe. And a lot from the Indian sub-continent. Most recently, Asians, including Hong Kong.

The metropolitan area has about 600,000 people. The school district goes way out in the country. He has about 75,000 kids. And 195 schools.

Mike has been a superintendent for 19 years. More important: He has been in that district 35 years. He went almost directly from teacher to superintendent. He'd been brought into the central office in 1972, after a big hassle in which he'd been a leading critic of the then-superintendent. Soon after, that person then left. Mike filled in; and then stayed.

The former superintendent had had the idea about site-management. But there was no follow-through. People in the central office were opposed.

About 1974 Mike asked 60 schools if they'd be interested in what he then called "school-based budgeting". He started the program two years later with seven schools. He told them to tell him how they'd put it together to make it work. He found that folks changed the way they talked, when they became responsible for doing it. They became more cautious. But they would do some things. He kept saying, "If it's not illegal, immoral or inane, you can

propose it." The folks in the schools kept wanting to know their limitations; Mike kept telling them to define that.

In the end it took two years to settle on what authority the schools were going to have. What shook out was something like this: the schools would run the budget for operating salaries, supplies, staff development, sick leave, library books, equipment repair and minor maintenance.

The experiment ran on until about 1979; working more and more successfully. So other schools began asking if they could get in, too. "No," Mike said, "this is a pilot." The teachers union was upset by the seven schools that could do things differently. They asked teachers what they thought. It turned out teachers liked the idea. A majority said, let's try it.

So in 1979 it went district-wide. It was a very difficult period. They set up factors on which to allocate teachers, custodians, etc. to the schools, and on which to construct budgets. Over time this has changed: They now just give the school a flat amount per student, and adjust this from year to year according to an index that factors-in costs and revenues. Schools do carry forward both surpluses and deficits.

There was nothing fancy set up for governance. Almost from the beginning Mike had said that inside the school the principal was mainly responsible: S/he has to have a plan, and has to disclose it: the school's authority, its revenues, who will be involved and how. The whole thing is principal-focused, and unstructured. The principal is simply obliged to involve people, on a need-to-be-involved basis.

And the district checks. Annually, it surveys both teachers and parents, to ask if they feel involved. The results of the parent survey are published in the newspaper. Each principal is then told how his/her school relates to the district-wide average re: parent and teacher satisfaction. "It's better to control the right things imprecisely than the unimportant things fully," Mike says.

In the beginning, though there was flexibility offered, the schools used the money in pretty much the way they had in the past: one teacher for every 22.1 kids, for example. Over time they made more use of their discretion. He thinks of two high schools of the same size, for example: One spent \$10,000 on computer hardware and the other spent \$400,000.

Mike says that about 75% of expenditure is now under the control of the school; and he is trying to move that to 85% within a few years. The district keeps maintenance over \$1,000, transportation, consulting, social workers, personnel. (In Edmonton food — lunch — was traditionally a school activity.) The budget he presents to the board is not a set of district-wide line-items: It is partly that, but very largely organized by school (two pages per school).

Edmonton is now in its third year with 17 schools now able to buy the services they used to get for free from the central office . . . and, of course, able as well to buy those services from suppliers outside the district. This is beginning to show real economies. Some schools that pay their own utility costs have been able to reduce their costs by up to half. And there are other benefits: Going on an enterprise-account basis seems to improve the morale of, say, counselors. When schools are willing to pay money for what they do, they know they are valued.

There was no master-plan for all this. Just a need, and an impulse. "You do work it out as you go along," Mike says.

Schools can decide to vary the method of teaching. Some have gone to un-graded instruction. They can vary the size of class. They can focus instruction . . . say, on environment. They have to meet provincial (state) requirements about courses, time and achievement.

In the basic agreement the district also said that any decision of the principal is appealable (by staff or parents); first to an administrator, then to the superintendent, finally to the board. This could involve teacher-assignment. Or decisions about leaves. Or the placement of a child. About 50 appeals get to the superintendent each year; about 10 reach the board.

All this has developed in the context of the particular situation in Edmonton, which is quite different from most situations in the United States.

The personnel arrangements are different. So a school can select the teachers it wants, from within the district. There is no seniority provision in the law or in the contract. If the school needs, say, 10 physics teachers and all 10 are equal, then seniority would prevail. It's a mutual agreement. A teacher has no right to a position: Our 'bumping' is not possible there.

Teachers are members of the Alberta Teachers Association, established in 1935. Membership is required: Only the superintendent and one deputy are excluded. Principals also belong. All central office people are certified. The ATA is both a union and a profession. Either the superintendent or the ATA, for example, can institute a dismissal (which Mike thinks the ATA sometimes does "for the wrong reasons".)

The union contract itself says nothing about site-management. It runs for two years. Its strongest provisions have to do with pay, leaves, health/welfare benefits. The union attitude toward site-management is still somewhere between ambivalent and reluctant.

Site-management appeared in the context of choice.

The Edmonton public district used to have school-attendance-areas (which a child could cross only with an administrator's permission). Those were removed in 1972, so kids can enroll elsewhere. A family can now go to a school outside its neighborhood, and the school must take the child in unless there is simply no space available in the building. This means that if a certain grade is full, or a certain program is full, the school must expand that grade or program. Only the building capacity counts. "We wanted to make sure the school would take in the kids," Mike says. Sometimes a school falls well below capacity. In those cases his response is to put in staff that will draw enrollment.

The parent is legally responsible for getting a child to school, though if the other school is more than .75 mile away the district will provide a ride. Kids ride both the red (city, regular-route) buses and the yellow (district) buses. A family pays \$14 a month for a child to ride either bus. The district is involved only in the planning and scheduling of routes. The city acts as purchasing-agent for school transport.

Probably about 10,000 kids are going to school outside their local area. The district buses about 20,000 kids a day; but some of that is high school kids who live more than the .75 mile away. He says it works smoothly. I asked how a school can plan. Mike responded with a Canadian expression which translates roughly as "rubbish". (On another question often asked about site-management he answered: The district buys the insurance.)

I asked him how he saw the relationship between site-management and choice. The intention with site-management, he said, was to relieve the problem of staff alienation. But clearly its effect has (also) been to attract and hold parents.

Partly this has to do with the way the district evaluates principals about their involvement of others; and the way it reports this to the public. Partly this is because of the special kind of choice parents have in Edmonton.

To appreciate this you have to understand that there are two overlapping publicly-funded school districts in the Edmonton area: the public district and the Catholic district. The Catholic district enrolls about 25,000 kids.

Under an arrangement that goes back to the 19th century, Catholics vote for the board of the Catholic system; non-Catholics vote for the board of the public system. And every taxable property declares itself either public or Catholic. Taxes from the properties declared Catholic go to the Catholic schools; taxes from the properties declared public go to the public system. Under a more recent law taxes collected from properties that do not declare (as most businesses do not, in their modern corporate form) are divided in the proportion that Catholic and public students represent of the total. (There is also provincial aid. It provides about 60% of Edmonton's operating budget. It's not a foundation system: It's basically per-student, weighted by age. Edmonton's system spends about \$5,000 (Canadian) a year per student.)

Between the two systems there is open enrollment. If Catholic kids want to go to the public system (and about 5,000 do) Mike will accept them, without fee and without a local property-tax contribution. (He will, however, get the provincial per-pupil aid.) Similarly, the Catholic system will take in kids from the public schools, charging a modest fee (about \$100, on a sliding scale, by grade-level.)

Initially after 1972 there was a fear that with open borders Edmonton would have some empty schools. That didn't happen. The low-performing schools improved, and held their students. Those schools did not catch up with the leaders: They are willing to be followers. But Mike thinks everybody has a 'comfort zone': You may not want to (or be able to) lead. But you're not willing to be lapped.

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The meeting brought into focus a number of key questions about site-management. We could not resolve them; only clarify them.

- 1) What is really happening, and what is just talk?

This was the question that prompted the meeting. Carl is concerned about the tendency of superintendents to claim they're doing whatever seems to be popular at the moment. Site-management is regarded as a 'good thing'. And talking about it is easier than doing it.

- 2) What difference does any of it make for kids in the classroom?

Nobody really knows.

- 3) Does it last? Does it spread?

The implication in all the discussion is that, if this or that district can do it, you can too. The whole consulting business that is developing, to show districts "How You Can Do Site-management", is based on this assumption.

Maybe that's wrong. Maybe what we're looking at is just the effect of exemplary individuals . . . the five per cent that always exists in any field who can do what others cannot do.

If this is true it would explain why site-management does not spread, and why it often does not last even in a district where it has been installed. Mike Strembitsky thinks it would last in Edmonton. But obviously no one knows for sure.

(In addition to the exceptional individual there is the exceptional situation. A striking number of the prominent cases of site-management involve districts in which the superintendent who prompted it had been a teacher in that district: Peter McWalters in Rochester, Joe Fernandez in Miami/Dade County, Mike Strembitsky in Edmonton . . . and how many others?)

4) How far is site-management a structure; how far a process?

For some people the structure is the essence of it. There is a council, and a system of representation, and a formal process of voting, and meetings where there is more voting.

Edmonton contains none of this. No structure. Site-management is a process, focused on a responsibility given to (and enforced on) the principal.

5) Is site-management (per Bill Andres) something you do, or something that happens if you do the fundamentals right?

The assumption in the discussion is that this change in structure (or in process-and-relationships) is the fundamental — a re-structuring — that will then cause improvement.

Maybe it's the other way 'round. Maybe site-management is itself an 'improvement', which (apart from the presence of those exceptional individuals) will happen only when something else has been done.

That is even one of the possible, or possibly partial, explanations for Edmonton: that Mike could succeed as he did because a prior change had created the competition represented by the overlapping Catholic district.