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A case study in social change through education: Fogarty EDvance

One nonprofit is improving education in socially disadvantaged communities in Western Australia. The lessons it has learned may help other schools succeed on the path to educational equality.

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Many developed nations are struggling to overcome educational inequality. Apart from the moral imperative to make a quality education available to all children, the follow-on effects of poor academic outcomes—including an increased burden on health and criminal justice systems—are costly to society. Australia's Public Education Foundation calculated that the monetary cost of the country's increase in educational inequality from 2009 to 2015 was equivalent to 1.2 percent of GDP.[1] Fifty percent of young people in the most disadvantaged areas of Australia are not enrolled in school or working, compared with only 13 percent of young people from more affluent backgrounds.[2]

In Australia and other developed economies, transforming school performance at scale has been an elusive goal. While school systems must have high-level strategies for improving student outcomes, the real change must happen at the classroom level. Therefore, nothing short of a complete organizational transformation—with every politician, school administrator, and teacher on board—will bring the needed change. And the stakes have never been higher. The labor market is demanding more workers with advanced skill sets than society can deliver. That pressure will intensify in the coming decade, and if more students are disadvantaged in their early education, they will find it increasingly challenging to fill the skills gap as adults.

In Western Australia, the nonprofit Fogarty Foundation created the Fogarty EDvance initiative, which is on the cusp of bringing transformation at scale and creating a model that can help bridge the inequality gap in education. EDvance launched a three-year pilot program that aimed to support school leadership teams, principals, and their deputies in building more effective teaching and learning practices. The program is anchored in the idea that school transformation requires teams to lead the way, and it uses existing best practices from tested research in Australia and around the world.

EDvance teams support school leaders turning theory into action by designing and implementing tailored school improvement plans and building the necessary culture to drive performance. They also work to enable principals and their teams to influence the performance and overall health of their organizations.

To date, 27 schools from two cohorts have completed EDvance's three-year program.[3] All schools have reported improvements, with around 60 percent reporting significant improvement in every area of National Assessment Program – Literacy and Numeracy (NAPLAN) scores.[4] The primary schools scored above expectations in all areas of NAPLAN years three and five, sometimes by nearly one full standard deviation above expected performance.

EDvance developed a transformation framework that synthesizes major research and case studies from high-performing schools across Australia— allowing other schools throughout the world to benefit from their experiences. It also describes the interventions school leaders pursued at different stages that successfully led to better student outcomes.

The nuts and bolts of transformation

The Fogarty Foundation's approach is based on a set of fundamental beliefs. First, they believe that school leaders are uniquely positioned to oversee and foster effective teaching as well as implement evidence-based teaching—that is, teaching backed by research—that can improve

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[1] David Hetherington, "What price gap? Education and inequality in Australia," the Public Education Foundation, April 2018, publiceducationfoundation.org.au.

[2] Rebecca Cassells et al, "Educate Australia Fair? Education inequality in Australia," Bankwest Curtin Economics Centre, June 2017, bcec.edu.au.

[3] Forty-six schools have completed the three-year program; however, 27 schools have completed the program with a focus on both health and performance. Twenty-seven schools belong to Cohort 3 and Cohort 4.

[4] The NAPLAN score is a series of tests—focused on basic reading, writing, language, and numeracy skills—administered annually to Australian students. The school improvement program defines significant improvement as a step change in NAPLAN growth scores for reading and numeracy, school completion rates, as well as Australian Tertiary Admission Rank (ATAR), and vocational training.

student outcomes. Second, they believe that improvement strategies should be tailored to suit the varying challenges and contexts of individual schools. And third, they believe that sustainable change takes time. While short-term interventions can improve test scores for one year, achieving improved learning, every year, for every student, requires a more sustained and systematic approach.

The EDvance approach
The three-year EDvance program takes a multipronged approach to school transformation. The EDvance coordinators select a cohort of 10 to 20 peer schools that support learning through the program and share best practices with like-minded school leaders:

Using experienced ex-principals as mentors.
These mentors work directly with principals and leadership team members. The mentor group comprises highly regarded former principals who sign on to work with school leaders for the full three-year period.

Collecting rich data sets of school-specific information from key stakeholders. EDvance collected feedback from students, staff, parents, and the community on student experiences, teaching and learning practices, school culture, and personal leadership. These data sets were tracked across the three-year period to help school leaders and staff understand the progress made toward improved student learning.

Creating a toolbox of frameworks, resources, and processes. This toolbox promotes effective school leadership with best-practice research from education and other industries. Indeed, EDvance provides several means of support for school leaders, with the clear expectation that those leaders are critical support for teaching teams implementing changes at the classroom level. From 2016 to 2019, schools had optional access to a small team of instructional experts that helped establish new school practices on a trial basis. Most schools in the program took advantage of the professional learning opportunity and had

an expert work closely with a small group of teachers to understand and try high-impact teaching practices. Several coaching sessions were also included.

The three-year program
The three-year EDvance program builds specific focus points into each year.

Year one: EDvance begins by forming a cohort of schools that works together and supports one another over the three-year journey. School leaders determine the team that will attend all workshops, and how they will share the information with their broader teams. Each school in the cohort completes a baseline assessment of their school's student performance and gathers extensive information on the experiences of the major stakeholders— students, staff, and parents—as well as the health of their organization.

Through a series of workshop days, each cohort dives into research and best-practice examples, developing a comprehensive perspective on school leadership, teaching, and learning. By considering this information in the context of their own school environment, and through consultation with the larger staff, school leaders codify a strategic plan for the next three years. This is developed into a streamlined strategic-directions document that enables all staff to clearly identify their role.

During the first six months, program leaders emphasize clarity and focus, carefully planning workloads and ensuring that only the most important and high-impact initiatives are undertaken. In addition, many schools add new processes that will support them through the implementation journey—regularly scheduled, highly structured meetings every five to eight weeks to discuss progress, troubleshoot, and maintain the course. The Fogarty EDvance team provides feedback on each school's strategic plan, ensuring a culture of high expectations is maintained throughout the program. Between the six- and nine-month marks, schools are positioned to turn more of their attention to implementation.

Health and performance are monitored continuously, and workshops are dedicated to supporting school leaders and fostering collaboration with the cohort.

Year two: During the second year, school leaders lead the change. Among many other efforts, this involves a relentless focus on the most important work—investing in the upskilling of staff, the follow-on activities that support translating theory, tracking progress (both the challenges and the successes), and troubleshooting with the leaders of key initiatives. School leaders zero in on how to carry out their critical school improvement ideas—working to build a stronger organization while implementing different practices. As the year unfolds, schools fine-tune the plan by assessing what is and is not working. Health and performance are monitored continuously to inform these discussions, and workshops are dedicated to supporting school leaders and fostering collaboration within the cohort. In year two, many schools try new teaching and learning practices, focusing their follow-through efforts on a small group of teachers to ensure that each teacher achieves success under a high-support model. These teachers then receive the necessary support to mentor other teachers at the school.

Year three: Implementation and tracking health and performance continue well into the program's third year. During the final six months, school leaders step back to consider the progress they've made and the research and evidence-based interventions that might drive their continued improvement for

the next three years. The leadership team crafts the next iteration of their three-year plan that includes the effective practices that have driven their success over the past 30 months. This plan sets the school's future direction.

Once the schools complete the three-year improvement program, they become part of the EDvance network and alumni of schools and educators who can receive ongoing support, including access to current research and workshops.

Key factors of transformational success
The EDvance transformation framework points to seven important actions taken by most successful schools.

Allocate adequate time for different stages of transformation
Fogarty EDvance designed a three-year transformation schedule to ensure adequate time for each stage and that school leaders are well equipped to drive and sustain the change across the entire school. The transformation plan allows enough time to:

— *Plan the change.* School leaders are more confident that the work will have long-lasting impact when they take several months at the

beginning of the program to anchor each school's thinking, process, and language in common. Inviting key stakeholders into these discussions is also a critical initiative. School leaders feel more empowered to remain on course in subsequent years, with a clear sense that their strategic direction is right for their school based on the school's current level of student performance.

— *Advance through trials and practices to get to the best answer.* The program provides schools with effective school-leadership frameworks, resources, and practices from Australian and international research. Approximately 16 days are spent on professional learning where school leaders are given time to consider the most compelling current evidence on comprehensive school leadership, including instructional school leadership, effective teaching, and learning practices. School leaders recognize that they struggle to create enough time for discussions in their daily work, and the time spent on this during transformation deeply informs what is best for their schools.

— *Embed the change.* With a three-year focus, there is adequate time to ensure the transformation will be sustainable. This work often builds over time—schools implement an idea during the first two years and then test its efficacy and focus when embedding it into the organization. Schools consistently review their efforts to build and layer ideas over time.

Involve the entire school, not just key stakeholders
The program makes sure that the entire school is involved in the transformation, not just school principals. By working with school leadership teams, who subsequently work with their school communities, a common language is developed over time. The staff who facilitate and embed the changes are deeply involved and feel ownership over the process.

Use specific and quantifiable metrics to measure impact on health and performance
To track the journey, school teams identify quantifiable measures of performance and health specific to each school, with several consistent metrics across each cohort. This gives a clear view of year-to-year progress for each school. It also helps identify the areas each school needs to further develop.

Focus on organizational health
From the beginning of the journey, the program focuses on embedding organizational health. While performance is related to driving financial and operational results, organizational health is the ability of an organization to align itself, execute with excellence, and renew sustainably to achieve performance aspirations.[5] It also integrates health interventions into the day-to-day of the school transformation program. For instance, changes in teaching practice often require changes in behavior. Throughout the transformational phase, mentors and Fogarty staff spend a considerable amount of time on workshops and continuous coaching about the practical ways school leaders can positively influence mind-sets and staff behavior.

Performance and health go hand in hand
The school transformation begins with the following core belief: school leaders need to measure and manage organizational health with the same rigor as performance. Throughout the three-year transformation, schools focus on student outcomes and organizational health, which leads to sustainable performance improvements.

School health
As a part of the program, the foundation deploys a change-management approach that includes the use of a robust and validated instrument to measure baseline organizational health and highlight areas of strengths and opportunities.

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[5] See Chris Gagnon, Elizabeth John, and Rob Theunissen, "Organizational health: A fast track to performance improvement," *McKinsey Quarterly*, September 2017, McKinsey.com.

A common language around management practices helps school leaders become more explicit about what they need to work on.

Insights from this instruction are used to identify new behaviors that can shape each school's work and the mind-sets that would underpin these behaviors. To ensure the transformation is on track, and to get continuous feedback, three health assessment checkpoints are undertaken for every school and cohort: one at the start of the transformation journey and the remaining two at the beginning of year two and year three. School leaders in the program, along with the EDvance team, reiterate the power of understanding each school's organizational health in relation to a broad range of organizations across the public and private sectors, as well as other school reference points. This exercise of considering general blind spots provides renewed energy to discuss school culture and daily practices.

School leaders find it particularly powerful to have a common language around management practices, such as role clarity and consequence management. This common language helps school leaders become more explicit about what they, as leaders, need to work on in their schools and what drives a healthy organization through a transformation.

During the three stages of the program, transformation experts help the EDvance team conduct workshops with each cohort that help them understand their organization's health results and plan actions based on these results. Workshop participants include the school leadership teams, their EDvance mentor, and the broader EDvance core team. These workshops act as critical knowledge-sharing forums where different leaders come together to share their day-to-day experiences managing the transformation. These opportunities not only provide access to outside expertise and the latest insights from the program, but also help build a strong community of schools that act as support groups for one another during the transformation and beyond.

The relationship between health and performance

The collective results of Cohort 3 schools demonstrate the relationship between health and performance (Exhibit 1).

In less than three years, the Cohort 3 outcomes across NAPLAN areas ranked at or above expected performance increased from about 50 percent to over 70 percent. Concurrently, the cohort's health jumped to the top quartile from the second quartile after the first surveys; they improved in the third survey as well. A similar trend was seen in the first-year performance and health results of Cohort 4 schools.

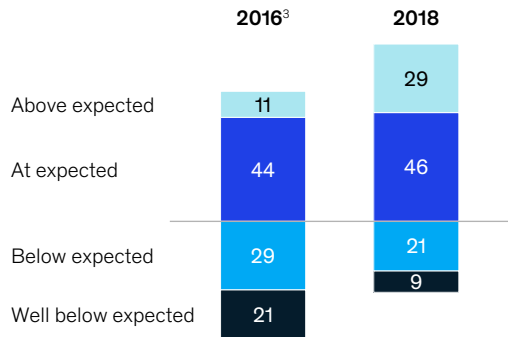## What are the critical drivers of health in schools?

It is important to assess the differences between the schools that showed the most improvement in health and those who improved the least. There were marked differences in the ways health increased in primary schools and secondary schools (see sidebar, "Organizational health improvements in primary schools outpaced those in secondary schools").

Exhibit 1

Evidence suggests a direct link between school performance and organizational health.

Performance, Cohort 3 schools

Expected NAPLAN[1] performance, years 3, 5, 9[2] (all areas)

	2016[3]	2018
Above expected	11	29
At expected	44	46
Below expected	29	21
Well below expected	21	9

- On average, schools have moved from "below expected" performance to "above expected" performance.
- Schools have seen real improvements collectively, moving from 11 "above expected" to 29 and from 21 "well below expected" to 9.

Health, Cohort 3 schools: Organizational health index

OHI data has hit the top quartile and continues to trend up

Second quartile — 2016

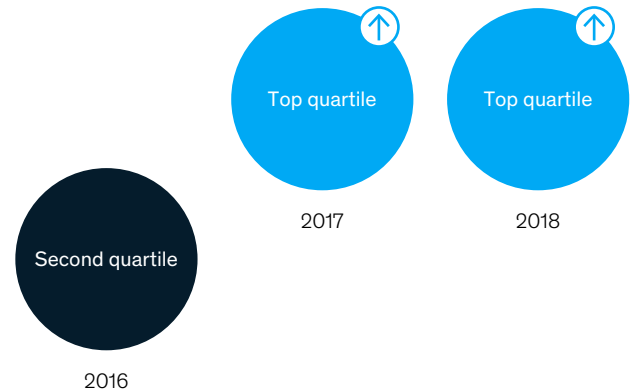Top quartile ↑ — 2017

Top quartile ↑ — 2018

[1] National Assessment Program – Literacy and Numeracy.
[2] Year 7 data not included for the secondary schools as this is considered "baseline/on-entry student performance."
[3] Beginning of program.

Organizational health improvements in primary schools outpaced those in secondary schools

Fogarty EDvance primarily worked with primary and secondary schools in metropolitan Perth and Western Australia. Since the start of the transformation program, primary schools have reported better organizational health than secondary schools and have outpaced secondary schools in their rate of improvement across management practices (exhibit). The primary schools reported a median increase of 16 points across practices for the first and second cohorts; secondary schools had a median increase of nine points. Interestingly, the trend in health improvements closely followed the performance improvements in both primary and secondary schools.

Several factors are likely driving the higher rate of progress in primary schools, with organizational size being one of the most important. On average, primary schools had 25 teachers and 43 staff per school, compared to an average of 37 teachers and 57 staff per secondary school. Many primary schools operate without a large middle-leadership team, which lets senior school leaders more directly understand, influence, and align the work of teachers. The intermediate leadership at most secondary schools makes it challenging for senior leaders to receive information that affects their decision making as well as translate and align strategic ideas. This finding is consistent with the experiences of organizations in other industries: smaller organizations are

often more nimble and quicker to transform than larger ones.

Secondary schools also saw progress in many of the areas in which primary schools improved, but not to the same extent. Practices such as career opportunities, reward and recognition, talent acquisition, employee performance reviews, and employee involvement saw less improvement at secondary schools than at primary schools. While there are many possible reasons for the discrepancies—including the added complexity of managing teenage students and the compounded effect of an inadequate primary school education—it requires further study to understand the source of these differences.

Primary schools outperformed secondary schools in pace of improvement.

■ Common top 10 practices[1] in primary and secondary schools

Primary schools

Practices

Practice	Value
Shared vision	23
People performance review	21
Role clarity	20
Industry insights	19
Rewards and recognition	19
Career opportunities	19
Outsourced expertise	19
Student focus	19
Operational management	19
Strategic clarity	19

Median increase across all practices — 16

Secondary schools

Practices

Practice	Value
Role clarity	18
Meaningful values	16
Shared vision	15
Industry insights	14
Performance contracts	14
Creative and entrepreneurial	14
Business partnership	13
Student focus	13
Outsourced expertise	13
Process-based capabilities	13

Median increase across all practices — 9

Insights

16pt

Median increase across all practices in primary schools

9pt

Median increase across all practices in secondary schools

Factors driving high rate of progress in primary schools:

• Fewer staff members per school makes it easier to cascade strategy and vision

• Absence of middle-leadership team kept senior leadership close to teaching staff and their challenges

[1] With highest increase between first survey and last survey.

Source: Fogarty EDvance OHI results for secondary schools that completed three surveys

Three themes emerged from schools that made significant increases in health over the course of their transformations (Exhibit 2).

A clear direction. Among schools whose health improved most, strategic clarity—as a management practice—recorded a median increase of 40 points over the course of transformation.

Transparent performance results. Making individual performance results public is often viewed negatively. However, when performance is clearly linked to rewards, this level of transparency can foster internal competition and a better understanding of who—or what—is producing positive outcomes for the school. This practice was the second most-improved in the healthiest schools.

Innovative classroom teaching. A culture of innovation, with the goal of improving student outcomes, was embedded deeply in schools' daily work.
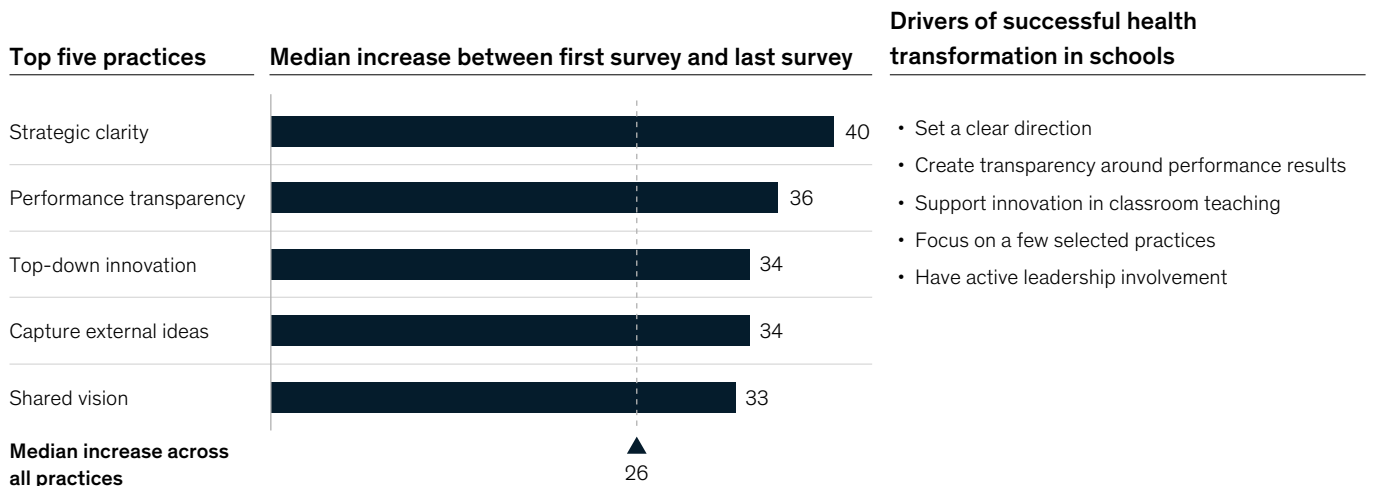
Reliable principal tenure. Schools where principals took an extended leave of absence—for example, a long service leave—or schools that brought in new principals midtransformation were generally unable to improve their health as much as other schools.

School leadership team interactions. Improving organizational health begins with mentorship from the top. The teams that already had strong working relationships or were able to adjust to new ways of interacting with their senior leadership team had the ability to support practice changes throughout the organization.

A focus on high-impact practices. Schools that chose to implement a small number of high-impact performance practices were more likely to improve their organizational health than schools that took on too many interventions.

Exhibit 2

The schools that most improved their organizational health shared several characteristics.

Top five practices	Median increase between first survey and last survey	Drivers of successful health transformation in schools
Strategic clarity	40	
Performance transparency	36	
Top-down innovation	34	
Capture external ideas	34	
Shared vision	33	
Median increase across all practices	▲ 26	

Drivers of successful health transformation in schools

- Set a clear direction
- Create transparency around performance results
- Support innovation in classroom teaching
- Focus on a few selected practices
- Have active leadership involvement

Source: Fogarty EDvance OHI results for secondary schools that completed three surveys

Transformation journey lessons

There are several lessons that we believe may apply to other schools in disadvantaged communities attempting to eradicate educational inequality.

Set a clear direction

Health in any transformation starts with clarity. Shared vision and strategic clarity helps leaders prioritize their actions and build alignment across the organization.

Bentley Primary School, for example, struggled with organizational health, particularly shared vision and strategic clarity. The Fogarty Foundation worked with the school to establish a common purpose that had student welfare at the heart. School leadership then made sure that all staff understood and lived up to that common purpose. School leaders invested in professional learning on workplace culture and refocused the staff's vision and values. They also developed collaborative team structures and regularly shared the school's strategic direction with all staff. Two years into the transformation, the school's organizational health increased, and its shared vision and strategic clarity significantly improved.

Involve employees and clarify roles

A consistent and meaningful purpose engages employees and helps to clarify their roles, both of which are essential to the success of large-scale change within an organization. Better role clarity creates significant benefits throughout an organization, including improving accountability, while engaged employees increase the probability of a sustained transformation.

Focus on learning

The EDvance transformation program's main goal is to measurably improve student outcomes. A significant factor in improving student outcomes is introducing evidence-based teaching practices across the whole school—such as increased collaboration, knowledge-sharing, and active mentorship among the teaching staff.

Some schools studied their performance data and derived insights to drive new planning and teaching approaches. For example, the school leadership team at Thornlie Primary School used data from across the school to plan literacy and numeracy instruction. The leadership team supported teaching staff by sharing their experiences and best practices in classroom facilitation, including explicit teaching, synthetic phonics, and oral language in the early years. As the result of the staff's relentless focus on different teaching methods during the school improvement journey, students at Thornlie Primary School demonstrated higher achievement and progress in all assessed areas of NAPLAN when compared with peers from similar schools.

Linking performance to rewards

Most employees associated with educational institutions and government organizations are highly motivated and mission driven—this holds true for those working in schools. However, without a direct link between performance and rewards that tap into their mission-driven mind-set (such as prompt recognition), employee support for a program may wane.

Staff performance reviews, consequence management, and rewards and recognition were low-scoring practices across schools in the program. In conversations with staff across schools, we found that it was often difficult for school leaders to provide genuine praise for work well done, as there were not always consistent follow-up processes. Based on this finding, adopting follow-up practices was strongly encouraged across cohorts.

For EDvance schools, rewarding and recognizing staff begins right away. By ensuring that everyone has clarity about their role and providing frequent performance reviews, staff are supported and stay on track. At the start of the program, school staff highlight areas where poor uptake or poor performance was often not identified or addressed.

There are often no mechanisms to track or follow up on ongoing issues. But by developing stronger review mechanisms and investing in more conversations to provide consistent and sustained follow-up and support, soon there were more opportunities to identify and reward excellent performance. This says to staff that great work will be recognized and appreciated.

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After successfully running the program with more than 60 schools,[6] the Fogarty Foundation set an ambitious goal to support more than 100 schools in disadvantaged communities, helping to reduce the educational inequality gap across Western Australia by 2021.

To achieve its goal and positively affect more than 28,000 students across Western Australia, the foundation must maintain its pilot's success rate—one that saw student outcomes significantly improve in 60 percent of schools. The Fogarty EDvance program continues to work with a new cohort of schools every year to enable grassroots change at scale. EDvance leaders hope that their framework can help educators across Australia and other countries raise student achievement levels in disadvantaged communities.

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[6] These schools have completed or are currently enrolled in the three-year program with a focus on health and performance.

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