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**Subject:** Foundation for Florida's Future, Key Reads: 7/15/11

## Foundation for Florida's Future, Key Reads: 7/15/11

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## NATIONAL NEWS

### Unlocking the Secrets of High-Performing Charters

Education Next

By: James A. Peyser

Fall 2011 / Vol. 11, No. 4

<http://educationnext.org/unlocking-the-secrets-of-high-performing-charters/>

*Tight management and “no excuses”*

Charter schools are approaching the ripe old age of 20. Although more work remains if we are to fully understand this complex education “movement,” a growing body of data and research is being compiled about its strengths, weaknesses, and impact. An important sector of the school sector is just now receiving a similar level of scrutiny. Charter management organizations (CMOs) are integrated networks of schools that came on the scene around the turn of the century, a little less than 10 years after the first charter school opened its doors. A recent study by the Center on Reinventing Public Education, by 2008 CMOs accounted for more than 10 percent of the charter school market and the beneficiaries of at least \$500 million in private philanthropy. At this scale, CMOs warrant a close look to improve our understanding of how they operate and perform, and whether they offer an adequate return on public and private investment.

NewSchools Venture Fund, a nonprofit grant-making organization, has been for more than a decade one of the leading private funders of low-income urban neighborhoods. Along the way, we have amassed data and direct experience that provide a window into this world. The data suggests that most of the CMOs in our “portfolio” are outperforming the local districts, especially for low-income students. Nevertheless, there is significant variation across our sample. The highest-performing CMOs in the NewSchools portfolio tend to be those that have embraced a particular approach to teaching and learning. These CMOs have created organizational and school cultures based on explicit expectations for student achievement and behavior, with meaningful consequences when those high expectations are not met.

#### Creating a New Market

In 1999, NewSchools Venture Fund made its first grant to University Public Schools, an emerging charter school network founded by Reed Hastings in California that would soon be renamed Aspire Public Schools. Supported by follow-on investments from NewSchools and the Melinda Gates Foundation, Aspire became the nation's first nonprofit charter management organization. Since then, NewSchools has helped to start and grow many more CMOs, mostly in California, New York, Philadelphia, Chicago, and Washington, D.C. Working alongside NewSchools and other national funders like the Walton Family Foundation, the Fisher Fund, the Robertson Foundation, the Dell Foundation, the Broad Foundation, the Charter School Growth Fund (see “[The \\$500 Million Question](#),” *forum*, Winter 2011). These and a variety of locally based investors, including the Hood Foundation in New York and the Renaissance Schools Fund in Chicago, have channeled hundreds of millions of dollars into a new sector of public education.

*What's a CMO?*

Unlike EMOs (education management organizations), their somewhat older cousins, CMOs are not-for-profit. Their nonprofit status advantages: access to philanthropic capital, greater mission alignment, and diminished political resistance. And, unlike more loose networks, CMOs manage their schools directly, either under contract to a school board of trustees or under a fully integrated government where single charter school boards can operate multiple schools or campuses). Under such arrangements, a CMO has effect and fire a school's leadership team and to establish most of the educational and operational systems in each of its schools.

Most CMOs are organized much like a typical school district, at least on paper. There are centralized functions, including executive several operations teams, which provide certain administrative, financial, and educational support services to each school in the network. They are generally distinct units (often with separate legal status and their own boards of directors), but they operate under the overall CMO office.

By the most recent national accounting in 2008, there were more than 80 CMOs, operating almost 500 schools. The most well-known network in the country is the Knowledge Is Power Program (KIPP), but the KIPP Foundation is not a CMO. The 99 KIPP schools are legally and operationally distinct from the foundation and, up until recently, each KIPP school stood on its own as an individual. In the past few years, several high-performing KIPP schools have begun to grow their own small clusters of schools, often managed in a way that they can be called CMOs.

My focus in this article is on the CMOs in the NewSchools portfolio, which often operate 10 to 20 schools or more, serve thousands of students, and are materially different from their smaller counterparts, especially in terms of finances and management. Beginning in the school year 2007-2008, we started to collect data on our CMOs: their central offices, student performance, staffing, growth, and finances. The combination of quantitative data and a decade of firsthand observations of CMOs in action forms the basis for this analysis.

Although the data presented below represent a unique look inside some of the more well-established CMOs in the country, it is important to keep in mind their limitations. First, the NewSchools portfolio includes 18 CMOs, just a slice of the total market. Second, this sample was selected. Indeed, the NewSchools investment model is based on high standards and thorough diligence for each venture we support. Third, the achievement data that we have collected do not track individual student growth over time, but instead are based on annual snapshots of school-level performance. Finally, the data are mostly self-reported by the CMOs, and although we have scrubbed the submissions for errors and inconsistencies.

It should also be noted that NewSchools is not an unbiased observer. We believe strongly in the potential of charter schools and CMOs to improve educational outcomes in historically underserved communities and on that basis have invested millions of dollars and thousands of hours. We are committed to transparency and to letting the facts speak for themselves.

If the NewSchools CMO portfolio were a single school district, it would rank in size among the top 50 in the country, comparable to Fort Worth. These CMOs operate exclusively in urban neighborhoods, serving predominantly low-income, high-need students (see Appendix A). The demographics of the CMO schools are roughly similar to nearby district-run schools.

On average, each CMO operates about a dozen schools, with future growth projected to reach just over 20 schools each. Our CMOs open an average of 1.6 schools per year, although the pace of new school openings in any CMO is often uneven from year to year. The average enrollment growth rate has been just over 45 percent. Many schools open with one or two grades and grow upward, adding one grade per year in pace with the original cohort of students. Average school size at full enrollment is 442 students. Half of our 18 CMOs serve (or will serve) grades K through 12, three serve middle and high school, three are networks of elementary schools (including K-8 schools), and three are high schools.

## Closing the Achievement Gap

The first question in any discussion about CMO schools is, how good are they? Measuring school or student performance is fraught with difficulty, especially if the goal is to make comparisons across classrooms, schools, districts, or states. We do not propose to solve these problems. Specifically, our analytical approach is to use statewide assessments to compare student performance in our CMOs' schools to their local district and state. Although we are able to track school and grade-level performance over time, our data set does not capture individual student results. Consequently, we are unable to measure directly the value our schools are adding to their students' learning growth, relative to their local districts. Given the similar demographics between schools in our portfolio and those in their local districts, however, we believe it is possible to make, albeit imperfect, comparisons between these two samples.

Looking at each of the CMOs in the NewSchools portfolio individually, we find that half are producing breakthrough results, with average rates that are at least 15 percentage points higher than their local districts. About 20 percent are outperforming the districts by a margin of 5 to 15 percent (proficiency rates that are between 5 and 15 percent higher than the districts). Another 20 percent are performing about the same as their local districts, and the remaining CMOs are underperforming their districts. Performance among schools within a CMO can also vary. When comparing district gaps within a CMO, the typical standard deviation is almost 10 percentage points. This level of variation seems to hold for large and small alike.

Viewed as a group, schools managed by our CMOs achieve rates of proficiency on state assessments in reading and math that are about 8 percentage points higher than those of schools in their local districts (see Figure 2). The gap widens to almost 12 percentage points for only low-income students. Limiting the sample to schools open five years or more, the gap widens to more than 14 percentage points. In our portfolio, CMO schools perform somewhat better in math than in reading, when benchmarked against their local peers on state assessments. On average, the math-reading proficiency gap is about 4 percentage points. Not surprisingly, the performance of these CMO schools relative to low-income peers statewide is not as impressive.

Although the NewSchools data set does not include state test results for individual students, it does include grade-level performance

which makes it possible to track improvement of cohorts of students from one year to the next. Looking at these data across all the middle schools that had test results for at least one grade in 2007, one finds a fairly consistent pattern of improvement. Annual math scores in 2007 and 2010 were almost 6 percentage points, while reading gains averaged more than 8 points per year.

Critics often suggest that superior performance in the charter sector is a result of high levels of attrition, caused by implicit or explicit pressure on school staff to “counsel out” the students who are hardest to educate. Excluding students who move away, our data show average attrition rates of about 12 percent, compared to many schools in high-poverty urban neighborhoods that have annual attrition rates of close to one-third. The highest performers in our portfolio have below-average attrition rates of approximately 9 percent, while the lowest performers have attrition rates of close to 20 percent. Apparently, the dynamic is what one would hope for: Parents at higher-performing schools are more likely to stay while those at lower-performing schools are voting with their feet.

A recent study commissioned by America’s Promise Alliance found that the average four-year graduation rate nationally is approximately 65 percent. Graduation rates among minority students are typically less than 65 percent, and among large urban school systems, graduation rates are typically 55 percent. Across the NewSchools CMO portfolio, comparable graduation rates average 65 percent. According to a 2010 U.S. Labor Department survey, just over 70 percent of the graduating class of 2009 enrolled in college the following fall. Statistics for low-income students show that only 40 percent of high school graduates at 57 percent. Eighty-four percent of graduating seniors from our CMOs enrolled in college, almost 60 percent at four-year colleges.

### *Finances and Staffing*

The second question about CMOs is inevitably, how much do they cost? To answer this question, one has to examine financial data at the school and central-office levels. Even though most CMO schools operate at breakeven on public revenue, many require significant private fundraising before they can survive on public revenue alone. Philanthropy plays a key role in financing CMO start-up and growth.

The underlying economic model of all CMOs is based on predictable public revenue streams, tied to school enrollment. Average per-pupil revenues (from all sources, including federal Charter School Program start-up grants) across the NewSchools portfolio were more than double those of district-run schools, ranging from about \$9,000 to \$16,000, depending on the states and cities where schools are located. Public revenue for charter schools is typically 20 percent below per-pupil funding levels at neighboring district-run schools. In addition, charter schools are generally required to allocate a portion of their budgets on rent or facilities-related debt service, an extra cost that is generally not included in most charter-school funding formulas. Taken together, these two factors can reduce charter school resources available for educational programs by 25 to 35 percent, relative to district-run schools.

With a few exceptions, the vast majority of charter schools operated by NewSchools CMOs are self-sufficient on public revenues (excluding capital costs). These schools typically incur deficits prior to their first year of operation (although these deficits are sometimes carried by the CMO central office), as they begin to hire staff, upgrade facilities, and purchase equipment and supplies, all before the first student before any public tuition payments are made. About half of new schools run at breakeven during their first year of operation, although deficits are common in the first three years of operation for those schools that begin with only one or two grade levels. About 40 percent of the NewSchools portfolio incur cumulative deficits through their first three years of operation. These early deficits are often partially offset by start-up grants from the federal Charter School Program and the Walton Family Foundation, which together typically amount to more than \$1 million, spread out over several years.

The largest component of a typical school operating budget within our CMO portfolio is instructional personnel, which comprises just over 50 percent of school spending (see Figure 3). School administration and other noninstructional activities account for about 17 percent of expenditures, with facilities expenses close behind at 15 percent. Nonpersonnel instructional expenses are just under 10 percent of a typical budget, with the remainder going toward building reserves and CMO management fees.

Operational spending per pupil during the 2010 school year was approximately \$10,200, with average school surpluses of just under \$1,000. Typically, these surpluses are used to build operating reserves of about 5 percent of a school’s yearly budget, to insure against non-recurring needs, temporary revenue interruptions, or fluctuations in annual per-pupil funding levels. Additional reserves are occasionally required by state covenants, especially regarding bonds or loans for school buildings. Many schools have larger reserves to lay a financial foundation for the purchase or renovation of a permanent facility.

The net philanthropic need for all schools managed by CMOs in the NewSchools portfolio is effectively zero, but since the schools’ surpluses generally do not cross-subsidize those with deficits (sometimes even within the same CMO), the actual school-level philanthropic need across the 71 schools in the portfolio with operating deficits was more than \$25 million in the 2010 school year, or just under \$360,000 per school.

The average central-office budget in 2010 was about \$5.3 million, or more than \$1,500 per pupil. More than 60 percent of central-office staff are instructional personnel. On average, central offices employed about 45 staff, which is 14 percent of total CMO staff, including school-level personnel. The average CMO home office is dominated by personnel providing educational services (including assessment, curriculum, and professional development) and operations (including finance and facilities). Over the past five years, the relative sizes of these two categories have been moving in opposite directions: The education staff has been growing (from 21 percent to 34 percent), while the operations staff has been shrinking (from 39 percent to 26 percent). The ratio of central-office staff to total CMO staff tends to decline over time, averaging about 30 percent in year one and falling to about 20 percent by year seven. The average number of central-office staff per school fluctuates from year to year within most CMOs, but does not seem to have a clear trend up or down over time. Across the NewSchools portfolio, central offices tend to have about 4.5 staff per school, although some are beginning to see this ratio drop.

As Figure 3 shows, CMO management fees are typically about 7 percent of a school’s budget, although it is not uncommon for fees to be 10 percent or higher, depending on the breadth of services provided by the central office. On average, these fees covered more than 50 percent of central-office costs in the 2009-10 school year.

During its first year of operation, a CMO central office earns relatively little of its revenue on management fees from preexisting schools. Once a central office is established before the first school opens, annual fee revenue begins at zero. On average, fee revenue rises steadily as a central office covers its central-office costs, as the number of schools and students grows, exceeding 60 percent by year seven (see Figure 4).

Over the first seven years of operation, a typical CMO central office in the NewSchools portfolio incurred a cumulative operating deficit of \$1 million, which translates into \$800,000 to \$900,000 per school, or up to \$2,000 per seat at full enrollment. The distribution of deficit, however, is wide, ranging from under \$300,000 per school to \$2 million or more. Although it is difficult to allocate these costs precisely to specific activities, a significant portion of central-office expenditures is associated with growing the network of schools and building capacity at schools that are just beginning to come online.

Putting school-level and central-office economics together, CMOs in NewSchools' portfolio have run cumulative deficits through the first seven years of operation of more than \$250 million, which amounts to about \$3,150 per student at full enrollment for the schools that are currently up and running. School-level deficits are offset by surpluses at other schools within the same CMO network; other annual deficits at both the school and central-office level are funded out of reserves built up through surpluses in prior years. As a result of these factors, the net philanthropic need to date has been about \$200 million, which translates into an average per-seat need of about \$2,600, or more than \$1 million per school. In some cases, the need exceeded \$4,000 per seat and in others it has been under \$500 per seat. (These figures appear consistent with an unpublished analysis of the Charter School Growth Fund on the CMOs it has supported.) To keep this in perspective, the 25 to 35 percent inequity in per-pupil revenue between charter schools mentioned above amounted to approximately \$275 million in lost revenue for our CMOs in the 2009-10 school year. This need swamps their annual philanthropic need, even if the public funding gap is greatly exaggerated.

### *Patterns and Connections*

The final question about CMOs is, what makes the highest performers better than the rest? The data do not point consistently to any one source of variation, but there are some differential patterns in spending, staffing, and school design that suggest possible sources. Based on our observations by the New-Schools team over the years, the effectiveness of management and execution may be equally important, although it is difficult to quantify.

The five highest-performing CMOs in NewSchools' portfolio operate 85 schools and serve more than 28,000 students. Their low-income student proficiency rates that are more than 25 percentage points higher than those in their local districts. Comparing these CMOs with the lowest performers in the NewSchools portfolio, we find similarities: school sizes are virtually the same; central-office spending as a share of total spending is about the same, as is instructional spending as a percentage of total spending. Nevertheless, there are quantifiable differences: low-level spending per pupil is higher, central-office staff comprises a higher percentage of total CMO staff, and the share of central-office human resources is greater.

The 20 percent spending gap between the lowest and highest performers is clearly a significant factor, although at least one of the lowest performers spends less per pupil than the portfolio average. Our high-performing organizations spend some of the extra money hiring more teachers. The average number of students per teacher among the top five performers is only slightly lower than among the bottom five (15.1 vs. 16.3), which masks larger differences. Three of the top five performers have student-teacher ratios below 14, while three of the bottom five performers have ratios above 18.

Another important factor is the investment that the most successful CMOs are making in building the capacity of their central offices. These CMOs focus on recruiting and developing talent, as well as building instructional support systems that are grounded in the use of performance data. Based on our observations and feedback from school personnel, these deep levels of central-office investment appear to be adding significant value to school performance.

The rate and pattern of growth also appear to have some connection to performance differences. Although the high-performing CMOs add schools at a faster overall rate than the low performers (1.7 per year vs. 1.3), their average enrollment growth is slower (37 percent vs. 43 percent) over the same time, the pattern of growth among the high performers has been more consistent over time, while the low performers tend to grow rapidly early in their development.

Of at least equal importance are less easily quantifiable differences in school design. Specifically, the most successful organizations show a strong enthusiasm for learning and an expectation of college success for all, with a commitment to hard work and persistence in the face of setbacks. They have adopted standards-based curricula, with an intensive focus on literacy and numeracy as the first foundation for achievement, which typically manifests itself in extra time for reading and math each day and a relatively heavy reliance on direct instruction. They use differentiated grouping, especially in the early grades. And they are increasingly focused on developing and deploying comprehensive assessment and coaching systems to ensure more effective and consistent classroom practice, not just from year to year but during each school year.

Although several factors appear to distinguish the highest from the lowest performers, there is no obvious or simple pattern. With respect to every variable that we have examined, there is a wide distribution of data from one CMO to another, even among organizations with similar performance, operating in the same markets, serving similar grade levels. Although the data can give us some hints about where the differences in CMO performance are most likely tied to the quality of management and effectiveness of execution, factors that are difficult to measure. It has been said that high-performing schools are the result of a hundred 1-percent solutions. Not only is there no silver bullet, but even a secret sauce. The key to success is an unflagging attention to detail and an uncompromising commitment to excellence in the classroom, to the hallway, to the principal's office. As difficult as it is to do all of this while growing a new organization, it is even harder to sustain over time, especially as the original founding teams give way to a new generation of leaders. Some CMOs are already beginning to test, but it will remain one of their greatest enduring challenges.

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## 20-Year Hispanic Academic Gaps Persist in Math, Reading

Education Week

By: Sarah D. Sparks

July 13, 2011

<http://www.edweek.org/ew/articles/2011/07/13/36hispanic-2.h30.html?tkn=QPUFIV74RfKI8%2FemRDWoTx6Rhu5TVxmmlsX&cm>

### *NAEP report finds students gain, but not fast enough*

While growing numbers of Hispanic students have changed the face of American education in the past two decades, the gap between white classmates in math and reading remains as wide as it was in the 1990s, says a new federal study.

The National Center for Education Statistics [report](#), released June 23, finds that Hispanic students have improved significantly on the Assessment of Educational Progress since 1990. The mean scale scores in mathematics rose 28 points for Hispanic 4th graders and 20 points for 8th graders; in reading, the scores improved 10 points in the 4th and 8th grades from the early 1990s to 2009, with each 10-point increase representing one grade level of improvement.

Yet non-Hispanic white students exceeded Hispanic students' increase in math in both the 4th and 8th grades during the same time. Hispanic students' performance improved more slowly in reading, the growth was not slow enough for Hispanic students to catch up and close more than two grade levels between the groups in both subjects.

"I think with this report coming out, people can respond in two ways," said Raul González, the director of legislative affairs for the National Council of La Raza, a Hispanic-advocacy organization. "We can say, 'Well, we tried and we failed, so let's not try anymore.' Or we can look at the data and say, 'If 20 to 25 percent of your school system's kids are not doing well, we need to do something urgent.'"

The report, the second in a series by NCES analyzing long-term trends for student groups on the NAEP, compares students' average scores on the tests, not the percentages of students who reach each proficiency level.

The [first study](#), in 2009, found narrowing achievement gaps between black and white students in 4th grade math and reading and 8th grade math. There, too, white students retained a two-grade-level performance advantage on NAEP.

The new study came just days after the release of the latest NAEP results for U.S. history. The nation's 8th graders made gains from 2003 to 2009, with much of that attributed to stronger achievement for Hispanic and black students. However, even with the growth, only 17 percent overall were proficient or better.

Meanwhile, although 4th and 12th graders made no measurable gains compared with 2006, when examining their historical progress, Hispanic and black 4th graders both have posted sizable improvements and reduced the gap with non-Hispanic whites.

Overall, however, only 12 percent of seniors and 20 percent of 4th graders scored proficient or higher in history.

### *Language and Poverty*

The NCES study of Hispanic students also points to some signs of improvement. Among students in poverty, as identified by the National School Lunch Program, Hispanic and white students both improved significantly in math in both grades between 2003, when the data were first collected, and 2009. Achievement gaps narrowed a bit in grade 4 and shrank in grade 8 from 17 points to 13 points.

Language ability also seems to play a role in the achievement gap, the data show. Between 1998, when data were first disaggregated by language, the reading gap between English-proficient Hispanic students and their white peers shrank significantly, from 24 points to 15 points in 4th grade and from 22 points to 15 points in 8th grade.

By contrast, the reading gap between Hispanic English-language learners and their white peers actually rose by a point in 8th grade and shrank by 13 points in 4th grade, an amount that was statistically not significant for that group because of differences in the number of students. Yet NCES Commissioner Sean P. "Jack" Buckley said he would balk at saying English-language gaps are a bigger issue than racial gaps because each state can use different accommodations for English-language learners taking the assessment.

In more-detailed data tables not included in the report, Mr. Buckley said researchers have found that within the Hispanic student group, "If we would appear we have evidence that the cohorts of lowest-performing kids have increased [their scores] at a higher rate than the high-performing kids. Yet these gains among the lowest-performing Hispanic students were not large enough to close the gaps between the two groups." "Whatever policies have [been] implemented ... in the last 20 years or so ... would not have appeared to have been effective at closing the gaps they did seem to be effective in raising scores for both groups," Mr. Buckley said.

### *State Differences*

As of 2009, Hispanic students trailed non-Hispanic white students by more than two grade levels across the board, including math in 4th grade and 26 points in 8th grade, as well as reading gaps of 25 points in 4th grade and 24 in 8th grade.

Most states hewed close to the average gap, but Hispanic students in some states fared better than others. Florida, Kentucky, Michigan and Missouri all had achievement gaps smaller than 15 points in both grades and subjects, while California and Connecticut had larger achievement gaps than the national average in math and in 4th grade reading. Several states did not have sufficient data on Hispanic or white students to be included in the NAEP report at all.

Iris M. Chavez, the education policy coordinator for the Washington-based League of United Latin American Citizens, or LULAC, said the state results "unfortunately are not surprising."

Ms. Chavez partially attributes the lack of progress in some of the states with large Hispanic student populations to waves of recent immigration heavily Hispanic Southwestern states, requiring English-only instruction and greater scrutiny of immigrant students entering public schools. "From LULAC's perspective, you've seen some really backward movement in those states," she said. "While those states should have been making the biggest gains, politically they've moved backwards, and that has had a tremendous detrimental effect on these students."

Florida, however, is bucking the trend. It had less than half the national reading gap in grades 4 and 8. Gaps in math were 6 points smaller in 4th grade and 11 points smaller in 8th grade, compared with the national averages.

“We feel fortunate to have a state assessment system and the NAEP to balance and compare, to make sure we are headed in the right direction,” said Mary Jane Tappen, Florida’s deputy chancellor for curriculum, instruction, and student services.

The state’s K-12 chancellor, Michael Grego, said Florida has made significant policy changes targeting the Hispanic achievement gap over the last decade, including requiring any school administrator or teacher in a core content area or an elective who will have at least one full year of 60 hours of training “focused on specific strategies about how best to teach someone learning the English language.” English teachers receive 300 hours of training in English as a second language.

The state also has an advisory committee including Hispanic parents and community members who weigh in on any changes to the accountability system or English-language-proficiency program.

“We’re dedicated to closing the achievement gap by half by 2014,” Ms. Tappen said. “It would have been to our students’ disadvantage if we had high expectations and continued to push.”

With regard to the NAEP U.S. history results, some analysts suggest the progress black and Hispanic 4th graders have made since 2003 in closing the achievement gap with whites might not mean they are better historians.

“I suspect that the gains reflect an improvement in reading skills, not an improvement in knowledge of history,” said Diane Ravitch, a professor at New York University invited by the National Assessment Governing Board to comment on the results.

Hispanic students overall climbed 23 points since 1994 on NAEP’s 0-to-500-point scale, blacks 22 points, and whites gained 9 points. That said, the achievement gaps are still large. For example, while the percentage of Hispanic 4th graders scoring below basic dropped from 40 percent since 1994, far fewer whites—17 percent—were below basic in 2010.

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## Principals' Job Reviews Getting a Fresh Look

Education Week

By: Christina A. Samuels

July 14, 2011

<http://www.edweek.org/ew/articles/2011/07/14/37principal.h30.html?tkn=OXWFARBBV%2Bs28n4LjUPuwmDpIrxLMjT2wNX2&cmp=edweek>

Highly effective principals are mentioned in the same breath with good teachers as an essential ingredient for improving schools.

But when it comes to developing tools that can determine whether school leaders possess the qualities that promote academic growth and teacher satisfaction, that effort has been overshadowed by the intense debate over how best to measure the performance of teachers. As policymakers engage in pointed discussions about how—and whether—to incorporate sophisticated measures of student achievement and performance reviews, the conversation around evaluating principals has been less vociferous.

The balance, however, is slowly starting to shift.

Two groups representing elementary and secondary principals [announced a joint plan](#) on Thursday to help states and districts create evaluation tools that will provide trustworthy feedback and opportunities for professional development. WestEd, the San Francisco-based research group, also wants to be a national resource for such efforts, building on meetings the group has held with education leaders. As one of the first steps, it released a [literature review](#) this month of research in the field of principal evaluation.

The announcements by the National Association of Elementary School Principals, the National Association of Secondary School Principals, and WestEd adds to the backdrop of growing efforts across the country to improve districts’ current principal-evaluation processes.

Several districts and states, a foundation, various national groups and policymakers in recent years have all begun to take a hand in improving principal-evaluation processes to develop principals who can support high-achieving schools.

“We are clearly at a very different place [with principal evaluations] than we are with teacher evaluations,” said Edward Pauly, the director of evaluation for the Wallace Foundation, which has promoted educational leadership since 2000. His remark acknowledged that the foundation is primarily focused on revamping teacher evaluation at the moment. But, he added “there’s also widespread appreciation of how important principal evaluation is.” (The Wallace Foundation also provides funding to *Education Week* to support coverage of leadership.)

### *Codifying Leadership*

While attention may be growing around the need to improve the principal-evaluation process, most principal evaluations continue to be done through a yearly meeting with a district-level administrator, and may not touch on the principal’s role as an instructional leader.

Experts have long recognized the need for a more systematic, instruction-focused evaluation system that will spur principals to do their job. In 1996, the Washington-based Council for Chief State School Officers released a series of standards for principal leadership: [Interstate School Leaders Licensure Consortium Standards for School Leaders](#). This work was one of the first attempts to codify the qualities of good school leaders.

Revised in 2008, the six standards offer a broad look at all the areas where principals should demonstrate proficiency, such as “facilitating professional development, articulation, implementation, and stewardship of a vision of learning that is shared and supported by all stakeholders” and “ensuring the success of every student by acting with integrity, fairness, and in an ethical manner.”

Translating those standards into a method of measuring principal effectiveness has been a challenge, researchers say. The instrument must measure principals’ strengths, but also accurately diagnose weak areas and create a road map for improvement.

“It really is about understanding what standards are supposed to do. It’s that kind of leadership training and conversation that we have had,” said Karen Kearney, the project director of the Leadership Initiative, WestEd’s project.

### *On Capitol Hill*

The federal government also has attempted to steer the issue. In March 2010, the Obama administration’s [blueprint](#) for the reauthorization of the Elementary and Secondary Education Act proposed that states define what it means to be an “effective” or a “highly effective” principal. Under the blueprint, states would be required to use student academic growth as an important measure of effectiveness, and they would have to ensure that effective school leaders are spread equitably among schools.

Congress has been slow to move on ESEA reauthorization. But, recognizing that the issue is growing in importance, the project is part of the NAESP, based in Alexandria, Va., and the NASSP, of Reston, Va., is aimed at giving states and districts a road map to follow to improve their evaluation systems.

Gail Connelly, the executive director of the NAESP, said that the groups want to create a process that incorporates student performance evaluations, but also allows support for professional development and principal mentoring.

"We're responding to a real eagerness on the part of our principals that they be held accountable on all the things that matter," Ms. Connelly said. "We're including student test scores, but not that measure alone, she said, echoing the parallel discussion going on over teacher evaluations. The NASSP also wants to avoid a narrow focus on just test scores to prove a principal's effectiveness, said Richard A. Flanary, the organization's department of professional development services. "There are some things that are harder to measure, like culture an attitudinal aspect of what goes on in a school," he said. "Principals understand they're responsible for everything."

The principals' groups' new effort follows on an initiative begun two years ago by the National Board for Professional Teaching Standards' [certification process](#) for principals, modeled after the organization's 20-year-old certification process for teachers. Though the certification process is intended for principals who are already performing at an accomplished level, the organization is allowing the program to be used with the 36,000-student Jefferson County, Ala., district as a tool to promote leadership development. The NBPTS evaluation model is built on "propositions," such as leadership, vision, and management.

Joan E. Auchter, the chief program officer for the Arlington, Va.-based National Board for Professional Teaching Standards, said that principals have embraced the process, even if certification is not their ultimate goal. "They said the core propositions and standards are the road map that defines what they should be doing," Ms. Auchter said.

### *States' Efforts*

Among the individual states and districts that have created their own systems, Delaware has had a teacher and principal-evaluation system that uses multiple measures of administrator effectiveness, such as the principal's ability to analyze school data to create goals, and effectiveness in providing ongoing coaching to teachers.

Called the Delaware Performance Appraisal System II, or DPAS II, the review tool is now being modified to incorporate student growth in determining leader effectiveness. By the 2011-12 school year, educators will not be rated effective in Delaware unless they have demonstrated to produce student growth.

Florida's Hillsborough County district, which includes Tampa, includes elements in its principal evaluations such as test-score improvement for lowest-performing students and evaluations from teachers in the school.

MaryEllen Elia, the superintendent of the Hillsborough County district, said that she felt it was essential that the district revamp its evaluation systems in tandem. "I don't think you can be as successful with teachers if they don't believe it's a culture shift," she said. John Miliziano, the executive director of the Hillsborough Association of School Administrators, said principals in the county are interested in a new instrument as a way to create a career ladder for principals.

Currently, the main way for principals in the county to progress in their careers and increase their pay is to leave a school and get a new office. With a new evaluation instrument and a career ladder, the district can create different levels of proficiency within the principal ranks, such as "beginning principal" and "master principal," he said.

As part of its evaluation system, Hillsborough County uses the Vanderbilt Assessment of Leadership in Education, or VAL-ED, which is funded by the Wallace Foundation. The instrument is designed to solicit feedback from a principal's supervisor, as well as from the school.

### *Teachers' Feedback*

Principals should have little to fear from being evaluated by teachers, said Andrew C. Porter, the dean of the University of Pennsylvania's School of Education, and one of the developers of the VAL-ED.

"Teachers are not any more hard on the principals than the principals are on themselves," Mr. Porter said. "It doesn't look like, on a scale of 1 to 10, that teachers are at all hanging their principals out to dry."

Even with these examples of activity surrounding evaluations, Ms. Kearney, with WestEd, said that the focus on principal evaluations is more informal and less directed than the conversation surrounding teacher evaluations. She suggests that districts and states are so busy implementing procedures that they don't have time to talk about them, or there's less confidence that the home-grown evaluation process can stand up to scrutiny.

The WestEd leadership initiative grew out of California's efforts to try to bring some cohesion to various efforts. In addition to facilitating dialogue among California education leaders, WestEd has also released an informational paper that outlines principal-evaluation procedures as part of its new quest to serve as a resource for districts and states looking to upgrade their job-review process for principals.

The organization also recently released a review of 30 years worth of studies and other documentation on principal evaluation. Ms. Kearney took on that work when its researchers started looking for similar reviews, but could not find what they were looking for.

After interviewing researchers, searching online sources, and digging up reports produced by education foundations and other think tanks, the review turned up 68 peer-reviewed and non-peer-reviewed papers published between 1980 and 2010. Twenty-eight of those were representative of an "extremely thin research base," the literature review noted. Among the paper's other findings: Most district-developed principal-evaluation systems lack validity and reliability, and alignment between district evaluation systems and professional standards is mixed.

The NAESP, in collaboration with the Washington-based American Institutes for Research and Johns Hopkins University in Baltimore, provided information in its [own review](#) of the research around principal evaluations. Studies show that principals generally see evaluations as inconsistently administered, and out of alignment with national standards.

"While there's a lot of promise, there's very little evidence" on what an effective principal evaluation looks like, said Matthew Clifford, a research scientist at AIR. "One conclusion we draw from this is that more research is necessary."

Robert L. Monson, principal of 250-student Parkston Elementary School in Parkston, S.D., and the president of the NAESP, said that one of the goals of the two organizations is to shift away from the "industrial management" model that characterizes many principal evaluation programs in which supervisors just check off a list of goals for principals without necessarily tying them back to student achievement.

"We're not going to build the tool, we're going to build what should be there," Mr. Monson said. "It's a great experience to be helping principals while we're flying it."

*Coverage of leadership, extended and expanded learning time, and arts learning is supported in part by a grant from the Wallace Foundation. [www.wallacefoundation.org](http://www.wallacefoundation.org).*

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## **FLORIDA NEWS**

### **Florida Vies With Four Other States for Top Education Reform Honors**

Sunshine State News

By: Kenric Ward

July 14, 2011

<http://www.sunshinestatenews.com/blog/florida-vies-four-other-states-ed-reform-honors>

Florida will compete against four other states in an "Education Reform Idol" competition next month.

Patricia Levesque, executive director of Jeb Bush's Foundation for Florida's Future, will represent Florida in what the Thomas Fordl "should prove to be the biggest education policy event of the summer."

The other states are Illinois, Indiana, Ohio and Wisconsin.

Florida may be the odds-on favorite to win "Reformiest State 2011" as Fordham researchers have frequently praised the state for ac measures such as school grades and equal-access initiatives that have significantly increased the percentage of minority students Placement exams.

The winner of the Aug. 11 showdown will be determined by a vote of the in-person and online audience.

Click [here](#) for more details.

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### **New education chief touts school choice, other goals**

Orlando Sentinel

By: Lauren Roth

July 14, 2011

<http://www.orlandosentinel.com/features/education/os-gerard-robinson-education-commissi20110714.0.2727178.story>

*Gerard Robinson, Florida's incoming education commissioner, visits educators in Orlando*

Gerard Robinson, Florida's incoming education commissioner, visited Orlando on Thursday for a "look, listen and learn" tour and to with his background and approach to education.

A favorite of Republican governors and a supporter of charter schools and school choice, he has spent much of his career as a poli advocate.

Robinson, 44, has been Virginia's Secretary of Education since 2010 and will start in Florida some time after July 25.

He was previously president of the Black Alliance for Educational Options, a nonprofit that pushes school choice as a way to impro black children. Early in his career, he taught in a Los Angeles elementary school and opened a charter school in New Jersey.

Wearing a navy blue suit, Robinson shook hands with educators and talked about his background and experiences at the Florida A Administrators Conference in Orlando.

He also answered questions from the Orlando Sentinel.

Q: Virginia's charter school law is much more restrictive than Florida's, resulting in four charters in Virginia versus hundreds in Flori compare the two states' approaches?

A: The similarity is both are designed to offer another aspect for parents to choose. The governors in Florida and the state Legislatu aggressive in moving forward with charters.

Q: A significant number of Florida's charter schools performed poorly on state tests this year. Is there enough accountability and ov schools in Florida?

A: Does accountability mean some could be closing after one year? Some say it should be three years, five years. We don't do the schools.

Q: You say parents can and should "vote with their feet." When parents remove their children from failing public schools, what resp state bear for those schools?

A: Improving the bottom schools is already a priority of the state. These are things you have to do as an administrator.

Q: When private schools take public money, such as through McKay Scholarships for students with disabilities, should they be ac state?

A: We don't want to over-regulate private schools so much that they become public, but there should be some role. There has to be

Q: When you announced you were leaving Virginia, Gov. Bob McDonnell said you led efforts on expanding charter schools, college virtual learning and performance pay. All of these efforts were already under way or being discussed in Virginia before 2010, and yo constitutional authority over K-12 education. What was your role?

A: I testified before committees in the House and Senate on these and helped shaped the policies. The Virginia Department of Edu the administration's plans.

Q: Why was the spending in your office as the Virginia Secretary of Education five times higher in 2011 than the year before?

A: When I first went to work, we were in legislative session. Bills were being enacted. I have added staff and done more travel. We I four of us, and interns. I do a lot of driving,

Q: Did you attend public schools?

No, I attended Catholic schools in Los Angeles. I have three daughters. My eldest, who just graduated, went to public schools all th other daughters are 9 months and 3.

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## Troubled Schools Face More Setbacks

News 4 Jacksonville

By: Staff

July 15, 2011

<http://www.news4jax.com/education/28551847/detail.html>

### *State Requiring 4 Duval County Schools To Receive New Management*

JACKSONVILLE, Fla. -- A little more than five weeks before the new school year begins, the question of who will run four academic Duval County schools is becoming even less clear.

Under state statutes, after several years of low test performance and failing grades, Jackson, Raines and Ribault high schools and slated to make massive changes, including getting new principals and at least 50 percent new faculty while instituting an intensive

On Wednesday, the commissioner of the Florida Board of Education said he was against giving Duval County an extension of the s turnaround plan by the not-for-profit group Duval Partners for Excellent Education. The Board of Education is expected to made a fir appeal next week.

Thursday, the chairman of the Duval County School Board expressed displeasure with how Duval Partners is planning to spend the

Chairman W.C. Gentry told Channel 4's Vickie Pierre that he is opposed to Duval Partners' plan to hire a South Florida educational four schools for an annual fee of \$530,000.

Later in the day, Superintendent Ed Pratt-Dannals issued a statement also issued a statement withdrawing support of Duval Partne

Pratt-Dannals said the group was formed to help mobilize support for the four schools, not to run them.

"My hope is that the members of the board of Duval Partners will continue to serve in the support role that was originally envisioned said. "Should our appeal next Tuesday be denied, it will be my recommendation to the School Board to contract with Educational I management organization."

Earlier this week, the volunteer board of Duval Partners began negotiating with National Academic Educational Partners of Miami L schools. Duval Partners also hired former School Board member Brenda Priestly Jackson as its executive director and The uncertainty of who will run the schools when they reopen on Aug. 22 is troubling to everyone involved.

A group called The Friends of Northwest Jacksonville Schools is standing by the School Board's appeal to the state because group don't want to see drastic changes made to the neighborhood schools.

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## **STATE NEWS**

# Pennsylvania education secretary orders reviews of all state exams since 2009, especially Philadelphia's

Philadelphia Inquirer

By: Kristen A. Graham

July 15, 2011

[http://www.philly.com/philly/education/20110715\\_Pa\\_education\\_secretary\\_orders\\_reviews\\_of\\_all\\_state\\_exams\\_since\\_2009\\_es](http://www.philly.com/philly/education/20110715_Pa_education_secretary_orders_reviews_of_all_state_exams_since_2009_es)

Following revelations about possible cheating on state tests, Pennsylvania's education secretary has ordered forensic reviews of all state exams with special attention to Philadelphia.

"When you have multiple indications from multiple sources that something's not correct, that absolutely does require a greater level of scrutiny," Education Secretary Ronald Tomalis said in an interview Thursday.

A forensic analysis of testing data prepared for the Department of Education in 2009 looked at schools statewide for possible test irregularities.

Nearly half of the roughly 60 schools flagged for multiple statistical irregularities are in Philadelphia - 22 Philadelphia School District schools and 22 charter schools.

Five suburban districts and one local charter school outside Philadelphia were named in the report and will also be asked by the state to undergo forensic reviews of their 2009 results.

The Bristol Borough school system had one school, Snyder-Girotti, where two grades had multiple flags. Cheltenham, Strath Haven and Spring-Ford High Schools all had multiple flags for their 11th grade tests. Chester Community Charter School was flagged for four grades.

Though the report was finished in July 2009, it languished for two years until the Philadelphia Public School Notebook began asking about it recently.

Tomalis said he first read the report this week.

"Reading it, there are some red flags," Tomalis said. "And it really didn't see the light of day in 2009. It was lost, buried. Some of the things that there are things we certainly need to follow up on."

He said the department had begun a probe of why the report disappeared.

Test security was a key issue for him even before questions were raised about the 2009 PSSA scores.

After he was named Gov. Corbett's secretary of education in January, Tomalis said, he began asking questions about what kind of system the state had in place to analyze tests.

"I was told there was none," he said.

The state spent \$108,000 on the 2009 forensic analysis, but that was cut from the 2010 budget. Tomalis had earlier ordered the review for the most recent Pennsylvania System of School Assessment (PSSA) exams.

"That amount of money is a very, very good investment," he said.

Now, Tomalis said, he's asked for the results to be analyzed for 2010 as well.

"That way, we won't just get one snapshot," he said. "If there are trends that are disturbing, we will continue to act aggressively."

He expects the 2010 and 2011 reports to be completed by early fall.

For now, the department has told 40 districts and nine charter schools statewide to investigate irregularities flagged on their 2009 PDE exams.

They must report back to the Department of Education within 30 days.

"That will just be the first look. We will then see what the individual school district's response is," Tomalis said. "That will not be the end of it. If necessary, we will further pursue the issue and take all necessary action."

Tomalis declined to say what that might be.

Among the schools flagged in the 2009 report is Roosevelt Middle School. As The Inquirer reported in May, multiple Roosevelt teachers witnessed many test security breaches, and they attributed a remarkable two-year rise in state test scores to cheating.

The district this spring conducted its own investigation into Roosevelt testing improprieties and found claims of cheating unfounded.

Roosevelt was flagged by the state for both reading and math irregularities for both grades that attend the school.

The secretary said he was aware of the claims.

"I am indeed looking at issues that have been raised in the Philadelphia School District. I'm awaiting the report that will come from certain circumstances, it does lead me to look harder as to what might be happening with the PSSA," Tomalis said.

Philadelphia district officials have defended their test security and the integrity of their employees, promising to reopen old investigations and new ones.

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## **George Gund Foundation awards \$1.4 million to support innovative schools in Cleveland**

Cleveland Plain Dealer

By: Margaret Bernstein

July 14, 2011

[http://blog.cleveland.com/metro/2011/07/gund\\_foundation\\_awards\\_14\\_mill.html](http://blog.cleveland.com/metro/2011/07/gund_foundation_awards_14_mill.html)

CLEVELAND, Ohio -- In a show of support for efforts to create new and effective Cleveland schools, the George Gund Foundation has awarded \$1.4 million for district and charter school initiatives.

At their July meeting, foundation trustees approved \$800,000 for 13 new and innovative schools in the Cleveland School District. They also gave \$200,000 to fund the district's Office of New and Innovative Schools, and \$400,000 to Breakthrough Charter Schools in Cleveland and will open two more in the coming year.

The grants were among 94, totaling \$5.6 million, that the Cleveland-based foundation doled out to nonprofits in the areas of human environment, education and economic and community development.

Ann Mullin, Gund's senior program officer, said the foundation is in its fifth year of supporting the Cleveland school district's portfolio of innovative schools and that it is keeping its funding steady.

Foundation officials are pleased with what they've seen so far from the "transformational schools," Mullin said. Thirteen such schools in the Cleveland district, enrolling an estimated 4,000 to 4,500 students, she said.

Together with the Breakthrough schools, which work in partnership with Cleveland district, the efforts are "attracting students to our schools and retaining them and really striving to provide a different kind of learning environment," Mullin said.

"There are a lot of examples," she said, citing the Cleveland School of Science and Medicine, which has five times as many applications as the Campus International School at Cleveland State University, where a language-based curriculum is attracting families from outside the district as within.

Mullin said she's encouraged by the steady growth in the number of new and innovative schools, and happy to see there is demand for them. "They are attracting parents," she said. "To me, it says build more, and they will come."

The foundation's role, she said, is to provide start-up funds and early support, but eventually the schools will need to become self-sufficient. "They will well on their way, Mullin said, by carving out promising partnerships with businesses, such as the relationship between the MC2 School and General Electric.

Students benefit because they acquire cutting-edge business skills and become familiar with the competitive global job market the

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## **Evaluation rule changes could save Washington D.C. teacher jobs**

Associated Press

By: Staff

July 15, 2011 <http://www.canadianbusiness.com/article/34045--evaluation-rule-changes-could-save-teacher-jobs>

WASHINGTON (AP) — Termination letters are expected to go out as soon as Friday to district public school teachers who receive unfavorable evaluations, but D.C. Schools Chancellor Kaya Henderson has relaxed some evaluation rules that will allow some teachers to keep their jobs.

Washington Teachers' Union President Nathan Saunders says that teachers who were judged "minimally effective" can be granted a reprieve under the original guidelines for the evaluation system known as IMPACT, teachers who received that rating two years in a row were to be terminated.

About 500 teachers received the rating last year. Henderson says she is not sure how many teachers will be affected by the rules change, but estimates that it will likely be no more than "a handful."

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