



A Blueprint for
Secondary Education
in Philadelphia:
The Planning Process,
2006-2008

A Report by Research for Action

S E P T E M B E R 2 0 0 8



RESEARCH for *ACTION*

Research for Action (RFA) is a Philadelphia-based, non-profit organization engaged in education research and evaluation. Founded in 1992, RFA works with public school districts, educational institutions, and community organizations to improve the educational opportunities for those traditionally disadvantaged by race/ethnicity, class, gender, language/cultural difference, and ability/disability. For more information about RFA, please go to our website, www.researchforaction.org.

About this Report

Research for Action conducted the documentation of the two-year Blueprint planning process for secondary education. This report is a record of that process and the context in which it took place. We examine accomplishments of the process, and challenges and dilemmas the process surfaced. We suggest next steps for planning and implementation as well as recommendations for future planning initiatives.

Mission Statement

Through research and action, Research for Action seeks to improve the education opportunities and outcomes of urban youth by strengthening public schools and enriching the civic and community dialogue about public education. We share our research with educators, parent and community leaders, students, and policy makers with the goals of building a shared critique of educational inequality and strategizing about school reform that is socially just.

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Prepared by Research for Action

Eva Gold, Ph.D.

Shani Adia Evans, M.S.Ed.

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Authors

Eva Gold, Ph.D. is a Founder and Principal of Research for Action. Over the past 16 years she has studied high school reform in Philadelphia on multiple occasions, including the Philadelphia High School Collaborative's efforts to create high school charters (schools within schools), the start up of Talent Development, and the small schools campaign of the Philadelphia Student Union and Youth United for Change. She has conducted action research with high school students from these two groups, in which the youth identified and conducted research about issues important to their campaigns to improve their neighborhood high schools. Eva's other research interests include community and youth organizing, civic capacity for school reform, privatization of education, and literacies inside and outside of schools. Eva is an instructor at the University of Pennsylvania's Graduate School of Education where she teaches in the Mid-Career Program.

Shani Adia Evans, M.S.Ed. is a Senior Research Assistant at RFA. Prior to coming to RFA, she provided leadership in a variety of educational settings including youth development and after-school programs. She also served as a Peace Corps volunteer in Gabon, Central Africa. She is particularly interested in urban high schools, school choice policy, and community participation in school improvement. Shani completed a B.A. in Anthropology at Amherst College and a M.S.Ed. in Education Policy at the University of Pennsylvania. Her master's thesis considered the implementation of high school choice in four urban school districts.

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Introduction

In fall 2006, the Philadelphia Education Fund (the Ed Fund)¹ and the School District of Philadelphia (the District) began their work as co-conveners of a planning process for education reform in grades 6–12, referred to as the Secondary Education Movement, Phase II (SEMII)—A Five-Year Blueprint. In addition to a major grant from the William Penn Foundation for the Blueprint planning process (also referred to in these documents as “the planning process”), the effort was supported by smaller grants from the Claneil Foundation and the Carnegie Corporation of New York. The product of the planning process is a Blueprint to guide District planning for secondary school improvement over the next five years (2008–13).

Research for Action (RFA) was included in the William Penn Foundation grant request to document the Blueprint planning process. Documentation activities consisted of extensive observations of key planning activities and public events, interviews—both semi-structured and informal—with the co-conveners of the project and participants in the planning, and a review of documents related to the planning process. (See Appendix A for a full description of research activities.) The documentation of the planning process had several purposes. One was to provide periodic formative feedback to the co-conveners so that adjustments in the planning procedures could be made in a timely fashion. The feedback sessions also were opportunities for reflection and for communication among the co-conveners and with RFA. Feedback occurred through four formally scheduled sessions and informally through one-on-one conversations as appropriate. Another purpose for the documentation was to create a public report which would inform Philadelphia public school stakeholders and school reformers in other cities about how Philadelphia went about creating a five-year plan for secondary education reform, so that future planning in Philadelphia or elsewhere could benefit from the lessons learned in the Blueprint planning process.

Background to the Planning Process

The Blueprint planning process began in 2006, five years after the Commonwealth of Pennsylvania took over the School District of Philadelphia (the District). District schools, at least on the elementary and middle grade levels, were making achievement gains and Philadelphia had been touted as among the most improving big city districts.² Confidence in the system was growing and there was a sense that reform had momentum. For the most part, critique of District policies was subdued, despite evidence that the role of the public in decision-making was constrained.³

The planning process was designed to address at least two shortcomings in the reforms that had accompanied state takeover thus far. First, it was to bring high schools fully into the reform agenda, with special attention paid to the low-performing large neighborhood high schools. The Blueprint, as described in the grant proposal to the William Penn Foundation, was to improve Philadelphia high schools through the application of research-based practices. Second, the planning process was to be a participatory one in which a broad swath of public school stakeholders, representing District central and region-

¹The Philadelphia Education Fund is a non-profit education intermediary organization with a mission to improve the educational outcomes of underserved youth in the Philadelphia region. The Ed Fund works closely with school districts, schools, businesses, universities, non-profit organizations, community stakeholders and other partners. It is a member of the National Public Education Network, which consists of 80 local education funds across the country.

²Useem, E. (2006). Learning from Philadelphia's School Reform: NCLB and Related State Legislation in *No Child Left Behind and the Reduction of the Achievement Gap: Sociological Perspectives on Federal Education Policy*, eds., Alan R. Sadovnik, Jennifer A. O'Day, George W. Bohrnstedt, and Kathryn M Borman, New York City: Routledge. pp. 297–321; Christman, J., Gold, E. & Herold, B. (2006). *Privatization "Philly Style": What Can Be Learned from Philadelphia's Diverse Provider Model of School Management?* Philadelphia: Research for Action; Casserly, M. (2005). *Beating the Odds V*, Washington, DC: Council of Great City Schools.

³Gold, E., Simon, E., Cucchiara, M., Mitchell, C., & Riffer, M. (2007). *A Philadelphia Story: Building Civic Capacity for School Reform in a Privatizing System*. Philadelphia: Research for Action; Gold, E., Cucchiara, M., Simon, E. & Riffer, M. (2005). *Time to Engage? Civic Participation in Philadelphia's School Reform*. Philadelphia: Research for Action;

al offices, schools, parents, community organizations, school reform groups, and the business community, felt included, and therefore invested in both the plan and its implementation. The planners believed that robust public engagement was essential to ensure continuity of reform efforts through the inevitable future leadership changes.

Secondary Education Movement (SEM) I, instituted in 2002, were high school reforms initiated under the leadership of Paul Vallas, the District's Chief Executive Officer (CEO), and included: the design and implementation of a core curriculum for grades 9-11, expanded special admissions programs, increased learning opportunities through improved coordination between high school and post-secondary education institutions, increased focus on the 9th grade through 9th grade academies, greater emphasis on PSAT and SAT preparation and testing, and an increase in the number of high school options through the creation of new small high schools. Despite these reforms, 11th grade PSSA scores in Philadelphia were extremely low and had remained relatively flat, with only a slight upward trend beginning in 2005.⁴ Furthermore, and equally discouraging, typically half the students in cohorts entering 9th grade between 2000 and 2005 exited high school without a diploma within 4 years.⁵ Research indicated that although youth of all races and ethnicities as well as both boys and girls were affected, it was youth from the large neighborhood high schools, with the highest concentration of poverty, who faced the greatest challenges. The persistent pattern of low achievement coupled with the high dropout rate provided a strong impetus for the Blueprint planning process. Many believed that high school improvement needed to move beyond incremental steps to a planning process that would guide deep and comprehensive changes in Philadelphia's secondary education system.

The focus on deep and long-term planning for high school reform in Philadelphia echoed what had increasingly become recognized as an urgent national priority. In February 2005, governors, CEO's from some of the country's largest companies, and education leaders gathered at the National Education Summit on High Schools, where Bill Gates declared that US high schools are "obsolete" with grave consequences for college and work preparedness, citizenship, and the status of the United States among the industrialized nations.⁶ Locally, a Philadelphia collaborative, whose members include representatives from foundations, nonprofit organizations, the city, universities, and the District, led a project dubbed Project U-Turn, which focused on the crisis of school dropouts, and drove home that the failure of high schools was a problem with grave consequence for the future of the city.

Participants in the Planning Process

To produce a Blueprint for high school improvement, the Ed Fund and the District were to co-convene a planning process that would bring together those in the District who worked with high schools as well as parents, students and leaders from the non-profit, civic, community, university, advocacy and business sectors. Of particular importance were three other non-profits with a significant history of work around improving high schools—Philadelphia Academies, Inc., the Philadelphia Youth Network (PYN), and Communities in Schools of Philadelphia (CIS). These groups are referred to in this document as the "partner" groups in the planning process because of their longstanding status, like the Ed Fund, of being a partner to the District in its education reform efforts.

The Ed Fund-District relationship as co-conveners of the planning process was born out of past experience and complementary areas of expertise. Recently, the Ed Fund and the District had worked together to bring improvements to Philadelphia's middle grades. Mr. Paul Adorno, a senior staff member at the Ed Fund, former high school teacher, and alternative school director had led the Middle Grades Matter project and was selected to lead this new effort for his knowledge about schools and established relation-

⁴ Useem (2006); Christman, Gold & Herold, (2006); Accountability Review Council (2008). *The Status of 2006-07 Academic Performance in the School District of Philadelphia: Report to the School Reform Commission.*

⁵ Neild, R. & Balfanz, R. (2006). *Unfulfilled Promises: The Dimensions and Characteristics of Philadelphia's Dropout Crisis, 2002-2005.* Philadelphia: Project U-Turn.

⁶ Gates, W. (2005). Prepared Remarks at the National Education Summit on High Schools, February 25, 2005. <http://www.gatesfoundation.org/MediaCenter/Speeches/Co-ChairSpeeches/BillgSpeeches/BGSpeechNGA-050226.htm>.

ships within the District. Mr. Brian Armstead, the Ed Fund's Director for Civic Engagement was to work with Mr. Adorno to link this effort to the Ed Fund's larger civic engagement efforts. Their District counterparts were Deputy Chief Academic Officer Mr. Al Bichner and consultant Dr. Cassandra Jones, both from the District's Office of Secondary Education. Mr. Bichner was a former high school principal; Dr. Jones was a former district employee who had directed a high school small learning community in the early 1990s and had worked in the School-to-Career office. Later in the project the District team was joined by Ms. Naomi Housman, who became the District's Executive Director for Secondary School Reform, and who brought knowledge about national high school reform. The team was also joined by Ms. Rosalind Chivis, a former high school principal who was initially from the Office of Secondary Education but was transferred to the Office of Curriculum and Instruction during the planning process. The Ed Fund's resources included relationships with other organizations external to the District that were concerned with high schools, adolescents and youth. Through a multitude of projects including the College Access program, the Philadelphia Scholars program, The Philadelphia Educational Longitudinal Study (PELS), and the Small Schools Project, the Ed Fund was linked to a host of advocacy, community, and research organizations in the city. Furthermore, over the previous five years the Ed Fund had expanded its mission to include civic engagement for education reform, and therefore had access to a broad network of organizations which could contribute to the planning for improvement of secondary education. The co-conveners as well as the initiative's primary funder, the William Penn Foundation, believed that both District and public participation would be critical to creating a plan for improvement in secondary education that would be substantial, credible, and sustainable.

The Context for Planning

The planning process transpired over a period when the District faced substantial challenges. First, during the entire planning period the District was under financial stress, which created tensions between “dreaming big” about changes needed, and being “realistic” about what the District could afford. Second, the District's fiscal distress contributed to unanticipated leadership changes at the highest levels which meant the planning process took place in a destabilized environment and lacked the kind of top-level commitment that could legitimate it. As one observer of the political environment noted about planning during transition, “For this Blueprint to take hold we need to get it into the muscle of politics and the city. With the churn [in leadership], it's hard to build support.”(See Appendix B for a detailed description of the transition context in which the planning took place.)

Lessons Learned

Important lessons emerged from the planning process, both for Philadelphia and for other cities that may undertake similar planning initiatives. These lessons are described below:

- Building trust between a school district and an external partner is always a difficult task, but taking the time to do so is critical to forming a cohesive team that can effectively co-convene a planning process. District turmoil, such as that experienced by Philadelphia during the planning process, makes this already challenging task many times harder.
- It is challenging, but important, to bring a diverse set of public education stakeholders, each with its own agenda, to agreement around a shared plan for reform, if reform is to take hold and be sustainable.
- The planning process is made more difficult by the tendency of District offices and partner organizations to operate in isolation of each other. Greater alignment requires an alteration in District culture and practice and an intentional effort to coordinate among internal departments and with external groups. It also requires external groups to work cooperatively and publicly around a shared agenda rather than negotiate “private” agreements with the District.

- Participants in the planning process must have timely access to data, as well as a shared agreement about what data and research is credible and actionable.
- Introducing new approaches and ways of thinking about instruction, professional development and school climate, which carry implications for change in the central and regional offices of the district as well as change in school normative structures, culture and practice are difficult to achieve. Constant interaction across system levels, as well as alignment of reform efforts, is necessary to transform practice to support new ideas.
- An inclusionary process is required at both the planning and implementation stages, in order to develop champions—among educators, partners, parents, youth, and community members—who understand the reform ideas embedded in the plan and who therefore can play a role in ensuring its implementation.
- Throughout the planning process, there should be clarity about when reform efforts build incrementally on the past and when they should be radical in their departure from past practice.
- It is important that the plan developed includes clear measures for accountability in the areas that matter most to improving teaching and learning. The planning process should identify mechanisms that will ensure accountability of the district and its partners for the implementation of the plan.
- It is critical to establish who will be responsible for monitoring accountability, and making progress reports to the public during the implementation of the plan.

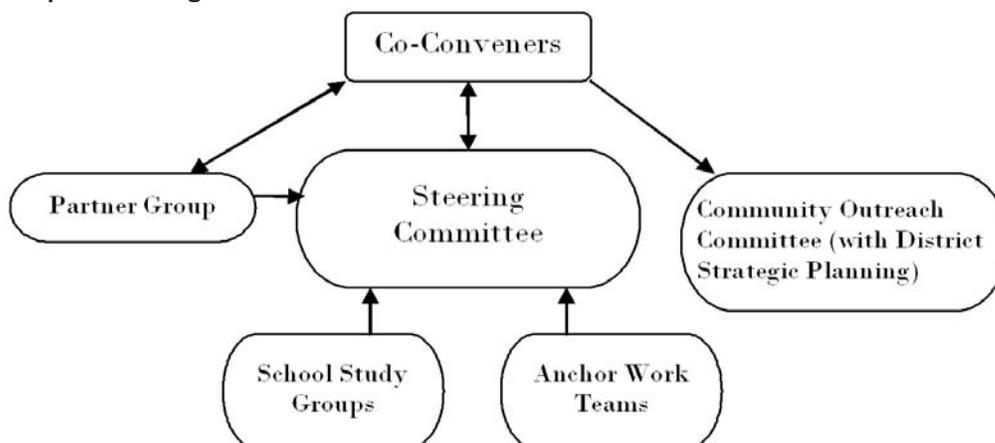
This Report

This report traces the planning process for a five-year Blueprint (2008-2013) for secondary education reform in Philadelphia. Following the introduction, this report, 1) tells the story of how the planning process unfolded, contextualizing the planning process in changes going on within the District and city, 2) discusses key accomplishments, challenges and dilemmas of the planning process as well as potential next steps, and 3) considers recommendations for future planning processes.

The Story of the Planning Process

The Blueprint planning process was complex and multifaceted. This section of the report explains the array of planning structures, activities and processes, what their purposes were, and how the planning ultimately unfolded. Below is a graphic representation of the major committees and activities that contributed to the Blueprint, which are explained in detail in the text that follows.

Primary Blueprint Planning Structures



Overview of The Planning Process and the Blueprint

The Blueprint planning process was to plan reforms for grades 6-12. Most attention, however, was on improving high schools. A District commissioned “White Paper”—*The Secondary Education Movement, Phase II: Redesigning Philadelphia’s High Schools* provided the initial framework for the planning process. The White Paper situated the planning process within a 20 year history of Philadelphia high school reform, and identified it as the second phase of high school reform under the leadership of CEO Vallas. The White Paper identified five “anchors” as the basis for high school improvement (See Table 1). These anchors were areas CEO Vallas had named as his priorities for the high schools.

Table 1: Five Anchors

Anchor	Focus
1	High Quality Instruction and Environment for Instruction
2	Effective, Accountable Leadership
3	Multiple Pathways for Out-of-School Youth and Students At Risk of Dropping Out
4	Small Supportive, Rigorous Schools and/or Communities
5	Career Pathways with Rigorous Preparation for College

For the most part, participants in the planning process perceived the objective to be to “look at where we have come so far with high school reform and what we need to take it to the next level in terms of outcomes for kids.” In addition, some participants hoped that this would be an opportunity to radically rethink and redesign the District’s approach to secondary education.

The Ed Fund envisioned that the planning process would:

- be strategic in efforts to include a broad spectrum of perspectives reflective of the diversity of Philadelphia;
- solicit meaningful input from dialogue with stakeholders both within and outside the public schools;
- build awareness of, and “buy in” for, education renewal at the secondary level throughout the larger Philadelphia community; and
- provide a blueprint for implementing substantial, realistic and sustainable reforms at the secondary level, including grades 6-12. *(Wm. Penn proposal, p. 9, 09/06)*

The Ed Fund and the District designed the Blueprint planning process to be more effective than past reform efforts at including a broad range of stakeholder perspectives. To this end, Dr. Thomas J. Smith, a consultant to the Ed Fund, conducted a “gap analysis” of resources and programming in high schools from the perspective of teachers, principals, students and parents early in the planning process.⁷ Noting the inclusion of the perspectives of school staff in activities like the gap analysis and throughout the planning, one leader of a partner organization observed that one “goal [of the planning process] is to make sure that people in the field, in the [school] community have a role in developing the plan. That it’s not just a top down. There’s school level input.” In addition to school level input, it was deemed important to involve partner organizations who provide various services to students, so that the plan could identify gaps in student supports, program redundancies and opportunities to improve coordination. One central office staff member explained, “We especially need to coordinate what’s going on in

⁷Smith, T. (2007). *Advancing High School Reform: Perspectives of the Philadelphia School Community to Inform the School District of Philadelphia’s Five Year Planning Blueprint*. Philadelphia: Philadelphia Education Fund.

the district with what's going on with our external partners.”

The key external school reform organizations—the “partners”—in the planning process were:

- Philadelphia Academies, Inc.
- Communities-in-Schools (CIS) of Philadelphia
- Philadelphia Youth Network (PYN)

The planning process was also to be an effort to build consensus and to foster “buy in” from community members, advocates, higher ed, and others who work outside the District. One District leader explained on multiple occasions that he hoped for a clear plan so that “everyone can go to city council united with one voice.” The idea was to engage stakeholders in the planning activities so they would become proponents for resources to support the Blueprint.

The District, partner, community, higher ed, youth, and parent participants in the planning process were to collaboratively create a Blueprint that would communicate the direction for secondary education, set priorities for budget decisions, and meet the needs of all students in grades 6-12. The co-conveners, however, called for “a collective focus on comprehensive high schools” because these large neighborhood high schools enroll the majority of District high school students and students in them often perform poorly. The balance between improving the large neighborhood high schools and radically re-designing them surfaced periodically throughout the process.

The initial planning documents, such as the William Penn grant proposal, did not prescribe the specific content or format of the Blueprint document. However, several participants commented on what they imagined the Blueprint would be. The quote below represents one committed participant’s expectations for the content of the Blueprint.

A substantive document that presents a vision of what high schools will look like 10 years out and includes an implementation work plan. It will assess where we are now and what we need to do to get to the long term vision. The plan will be multi-layered indicating changes that need to take place at central office, in facilities, in professional development, etc. and it will have a price tag. It will indicate how the district needs to realign its current budget and what monies need to be raised external to the district. It will indicate the partners that are necessary to bring in expertise and resources. It will also relate how central office will need to reorganize to support multiple pathways, including how human resources will populate the reconfigured system, how budgeting will occur to support the new schools, etc.

The Planning Structures

The planning process consisted of multiple structures and activities through which District staff, external partners, and other stakeholders gave input to the Blueprint. The primary structures are described below, as represented in program documents, including the grant proposal to the William Penn Foundation and program handouts, and early interviews RFA conducted with primary actors.

Anchor Work Teams

Five anchor work teams of professionals from inside and outside the District were to be constituted around each of the anchors identified in the District’s “White Paper.” (See Table 1 above) Each anchor work team was to have an internal and an external co-chair who were to collaboratively plan and lead the work team meetings. The Anchor Work Team Scope of Work called for these teams to be comprised of:

...folks who know the internal workings of the district, folks who are in schools where the issue is being addressed, and external partners who can bring to the conversations new perspectives and possible

radical departures from the accepted practice. This combination will allow for work informed by the current practices and realities of the district in a productive tension with possible new avenues of reform.

Each anchor work team was asked to conduct data analysis and to draw on their professional expertise to develop recommendations related to their assigned anchor.

The scope of work of the anchor teams was divided into three areas.

- First, the anchor teams were to do an inventory of policy and practice and determine which District policies may have contributed to ineffective practice.
- Second, anchor team members, who had expertise in their assigned anchor, were to serve as informational resources for the school study groups.
- Third, the internal/external leadership of the work team were to collaborate to produce “work informed by the current practices and realities of the district in a productive tension with possible avenues for new reform.” (Anchor Work Team Scope of Work)

Each team was to produce a report on their anchor that described: their data collection efforts, lessons learned, policies and practices reviewed, and challenges to implementation. Their recommendations were to inform the Blueprint.

School Study Groups

The school study groups were designed to elicit ideas from school-based communities, including teachers, administrators, students, and parents. Initially, twenty to thirty school study groups were to read, discuss and respond to the essential question: “What policies, practices, programs and resources need to be in place in every Philadelphia high school in order for each high school to award all entering ninth graders a quality diploma four years later?” (Wm. Penn proposal, 09/06, p.6) The five anchors were to serve as “critical lenses” guiding the work of the school study teams.

Each study group was to be assigned a facilitator trained by the Ed Fund, which was to provide readings, critical questions, and protocols to guide the study groups. The Ed Fund was to monitor the work of each group. The recommendations of the school study groups were to be informed “by their own experience as school administrators, teachers, youth, parents and community members, as well as by local and national data, the citywide gap analysis [conducted by Dr. Smith and referenced above], high school reform resources provided by the Pennsylvania Department of Education, the best thinking of selected national advisors and portraits of exemplary high schools elsewhere in the U.S.” (Wm Penn proposal, 09/06, p. 11)⁸ The recommendations and implementation suggestions of the school study groups were to contribute to the final Blueprint document.

The Steering Committee

The steering committee was designed to be the body that would lead the Blueprint planning process. The responsibilities of the steering committee were to provide direction and input for the planning, to coordinate communications with respective constituencies, to engage national advisors, and to communicate and coordinate with the school study groups and anchor work teams. The steering committee was to include representatives from the District, partner organizations, parents, students, teachers, and representatives of charter school organizations, the Philadelphia Federation of Teachers, and the Commonwealth Association of School Administrators (Wm. Penn proposal, 09/06).

The steering committee was to use the recommendations developed by the school study groups and the anchor work teams to create the Blueprint. As one co-convenor explained, the steering committee “guides the entire process. The work teams and school groups will report back to the steering committee.”

As can be expected, the planning process evolved over time, and, as it evolved, changes occurred in the planning structures described above and additional structures were developed. For example, fewer

⁸At one point, Mr. Vallas and Dr. Jones suggested that all 62 high schools would have school study groups, not just the 20-30 indicated in the Wm. Penn proposal, but this never materialized. In the end, a total of 15 schools participated in school study groups.

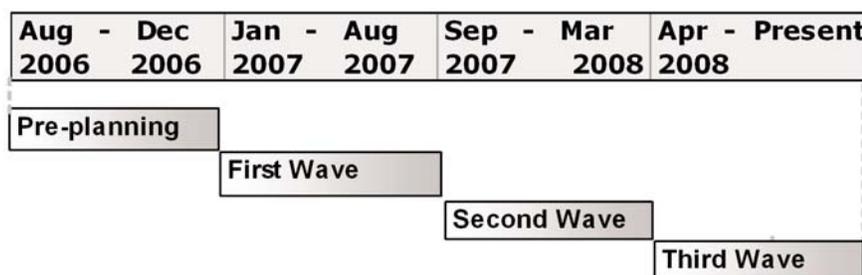
school study groups met than had been expected. Communication about planning was, instead, conveyed to schools largely through the district's principal meetings and through two Symposia in which many high schools participated. A community outreach committee was formed to work on community engagement around the Blueprint and the partner organizations were convened as a group to gather critical input from the leadership of those organizations, not all of whom could attend Steering Committee meetings regularly.

The next part of this section provides a full description of the course of the planning process and the changes that occurred as the process evolved.

The Planning Process: Chronology of Activities and Events

The planning process took place between fall 2006 and summer 2008. The story of how the planning unfolded is based upon extensive interviewing of the primary actors and participants in the planning process, observations of planning activities, as well as review of Blueprint documents and the Ed Fund Blueprint planning process website. In the chronology that follows the story is divided into four phases:

Timeline 1: Overall Chronology of Planning Process



1) pre-planning activities, 2) first-wave planning activities, 3) second wave planning activities, and 4) third wave planning activities. (See Timeline 1)

The story of the planning reveals a process that was buffeted by ongoing District fiscal crisis and leadership changes. From early on the Ed Fund and many other participants were concerned that top District leaders were distracted from the planning process by fiscal problems and a cascade of resignations and reassignments. Added to these impediments was a School Reform Commission (SRC) that was reluctant to champion the process, given the fiscal crisis and leadership transitions it faced.⁹ These conditions created a weak environment in which to undertake such an important and ambitious planning process. As one co-convenor commented, “the players keep changing ... [Mr.] Nevels is standing back and watching.”¹⁰

As one co-convenor reflected, the lesson learned from trying to plan during such a moment of transition was the necessity to be “flexible and responsive” to quickly changing District circumstances. Others talked about the importance of “patience” when working with “a lot of moving parts.” Even at the time of the writing of this report, the District turmoil had not settled; the new CEO (who prefers the title of Superintendent) is still deciding what her initiatives will be, and is in the midst of a strategic planning process.

Despite the difficult environment for planning, over time, the District and Ed Fund co-convenors cohered as a team around the Blueprint planning process. A set of ideas for improving secondary education emerged that resonated with the multiple constituencies engaged in the planning process. As the

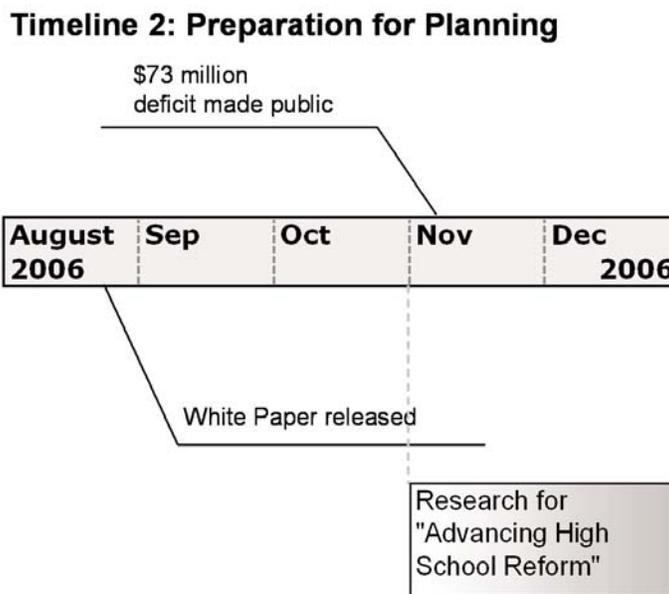
⁹The School Reform Commission was the District governance structure established in early 2002 shortly after the Commonwealth of Pennsylvania announced its takeover of the city's schools.

¹⁰Mr. James Nevels was Chairman of the School Reform Commission from 2002 to 2007.

story shows, the complex and multi-layered activities of the planning process engaged District players (from central and regional offices and schools), external partners, and invited in at various junctures a range of stakeholders, including representatives from community groups, institutions of higher education, parents, and youth. Gaining the participation of leaders from the city’s political and business sectors was a challenge, but in the last phase of the project, this was beginning to be addressed through efforts of the new mayor’s education team.

Preparation for the Planning Process: August 2006 – December 2006

A number of activities occurred in preparation for the launch of the Blueprint planning process.



Timeline 2 indicates the primary activities during this period and the major contextual factors that affected planning.

The White Paper, which was written for the District by Dr. Jones as part of her responsibilities as consultant to the Office of Secondary Education, identified the five anchors as the areas for high school improvement and linked them to Paul Vallas and his previous high school reform initiative, SEMI. SEMII was thus framed as a reform effort that would build incrementally on past efforts, but with a clear focus in this round of reform on improving the large neighborhood high schools.

As described previously in this document, as part of its preparation for undertaking a planning process, the Ed Fund worked with consultant Dr. Smith to conduct research on perceptions among school staff, students, and parents about the state of high schools in the District. The White Paper’s five anchors helped guide his research, which included gathering data from teams of teachers and principals, as well as conducting focus groups with students and parents. Informants were asked to assess both the progress and the needs of their schools in the five anchor areas. Although the report was published in February 2007, some of Dr. Smith’s findings were available in fall 2006 and they contributed to early decisions about how the planning process should proceed.

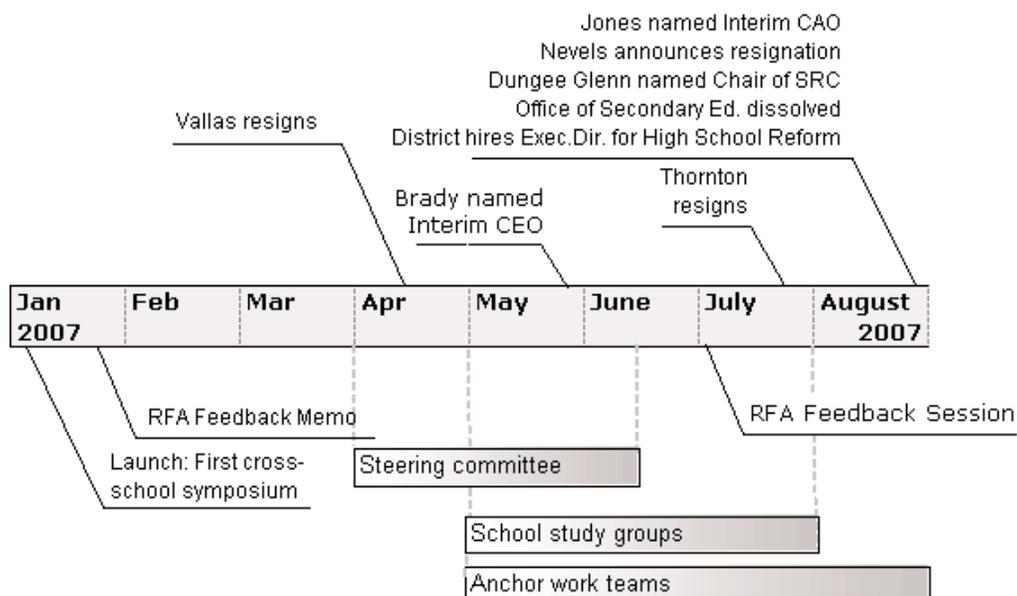
During this preparatory period for planning, the Ed Fund fleshed out the roles of various other actors, including partner organizations, national consultants, and RFA. The forming of the Ed Fund-District partnership to co-convene the process, also a task of this period, was overshadowed, however, by the emerging deficit crisis and the stresses it caused. These stresses contributed to a division of work between the Ed Fund and the District which limited interaction among the co-conveners and slowed the building of trust and the development of a cohesive effort.

The initial schedule of Blueprint planning activities had called for a launch event in fall 2006 to be followed by the first steering committee meeting. However, in the wake of the mounting district crisis, these activities were delayed until January and April 2007, respectively.

First Wave Planning Activities: January 2007 – August 2007

The first wave of planning activities was bookended by the launch of the planning process through a cross-school symposium and the completion of the work of the school study groups and anchor work teams. Shortly after the launch event RFA provided its first feedback to the co-conveners, focusing on the sense school teams were able to make of the five anchors in the context of their schools. A second feedback took place in July 2007. At this session, RFA focused on the accomplishments and challenges of this early planning period, with special attention given to the inclusiveness of the project, the complexity of relationships among the various planning structures, the difficulties of building a District-Ed Fund team, and the different conceptualizations of the Blueprint that were emerging. This time period was marked by a string of District leadership resignations and reappointments. Timeline 3 indicates both the major planning activities and concurrent changes in the District.

Timeline 3: The First Wave of Planning



The District hosted the official launch of the planning process with a Symposium of high school teachers, administrators, and partner organizations on January 27, 2007. CEO Vallas opened the symposium by introducing the planning process as a second phase of his Secondary Education Movement. Dr. Jones introduced the White Paper and the five anchors, which framed the day's activities. A panel of District and partner leaders commented on the importance of bringing change to the high schools, and they showed video clips of student testimony about their high school experience, which substantiated the need for change. District leaders recognized RFA's *Five School Study: Restructuring Philadelphia's Comprehensive High Schools* for its value in documenting the small learning communities of a previous reform era.

School teams of principals and teachers worked in small groups to assess their schools in the five anchor areas. The extent of engagement with the anchors may have varied across the school teams, but the launch event on the whole set the tone that the Blueprint planning process would reflect the experiences and needs of those who were closest to Philadelphia's high schools.¹¹

¹¹RFA memo on January 27, 2007 event, *A Journey to Excellence: Bold Dreams and Next Steps in Philadelphia Secondary Education*.

Planning activities were to begin immediately following the launch event but were delayed until spring 2007. The Ed Fund had an unanticipated set back in its staffing arrangements and the District did not move forward in hiring staff to lead the process although money in the William Penn grant had been designated for this purpose. The staffing shortage was further exacerbated when, under financial strain, the District reduced personnel in the Office of Secondary Education, greatly increasing the work load of those who remained. As a result of these setbacks, some of the planning activities, specifically the anchor work teams and the school study groups, did not get started until spring and the activities of these groups were conducted in less time than had been anticipated.

During the hiatus in winter 2007 planning activities, the Ed Fund staff attended various District meetings in which high schools were a focus. In these meetings, they learned about what one Ed Fund staff called the “central office must haves,” or aspects of secondary education that the District was not willing to change. “We needed to be clear about what was going to happen and what we could dream of from there.” As the winter progressed, Ed Fund staff became more present in the District’s various ongoing high school planning activities, while also working to get agreement on steps to forward the Blueprint planning structures and activities. At the same time, Ed Fund leadership was attempting to gain the attention of the SRC in order to secure backing at the District’s highest levels which was deemed necessary by many participants for the Blueprint planning process to be successful and sustainable.

Spring 2007- Steering Committee

In spring 2007, the pace of planning activities began to pick up. By April 2007, both the steering committee and the school study groups began meeting. The first steering committee meeting included a wide range of participants; in addition to staff from the Ed Fund, the District central and regional offices, and some schools, there were representatives from higher education, community groups, and other partner organizations in attendance. Dr. Constancia Warren, a national consultant to the planning process, was invited to share her expertise about national trends in high school improvement. The co-conveners gave presentations on past and ongoing state and District high school reform efforts and explained the role of the steering committee. Two more steering committee meetings were held that spring, in May and June 2007. Both meetings were attended by a similar group as the first. At the May and June steering committee meetings, the group continued to define its role and how it would interact with the various working groups. There was some early reporting on the school study groups’ proceedings and the plans for the anchor work teams.

The variety of participants attending the steering committee meetings suggested, at least to those who came to the meetings, that the Blueprint would reflect a range of public education stakeholder perspectives, both internal and external to the District (See Table 2). This inclusiveness of perspectives in itself accomplished a break from the top down reforms that had come to characterize the District. As one participant observed, “At the steering committee meetings, there are lots of different people and perspectives involved. It’s really rare to have that.” The early meetings, however, also reflected the fact that the co-conveners had not yet cohered as a team. District staff had taken on additional assignments as budget cuts reduced their numbers and there was little time for coordination with the Ed Fund. Therefore, there was limited between-meeting communication between the co-conveners, and between co-conveners and steering committee participants. The lack of coordination contributed to the District and Ed Fund separately leading different aspects of the planning process. In June 2007, the co-conveners suspended steering committee meetings for the summer, because too many of the participants were unavailable during the summer months. The initial idea had been that the steering committee would—in real time—reflect on and respond to work of the school study groups and the anchor work teams, bringing greater cohesion to the effort. It was, however, unable take on this task because the meetings were halted for the summer.

Table 2: Steering Committee Meeting Attendance

Date	District Staff	Non-District	Parent	Student	Total
05/07	13	12			25
06/07	5	13			18
09/07	16	15			31
10/07	25	12			38
11/07	27	24	3	4	53
12/07	12	22	3		36
01/08	22	22	5	3	46
02/08	16	23	2	1	40
03/08	8	29	4	1	39
04/08	14	18	1	1	32
05/08	7	13	1	1	22
06/08	16	5			25

Based on available sign-in sheets from 12 of 13 steering committee meetings. “Non-District” includes Ed Fund conveners and all other participants, excluding RFA staff. The parent and student participants are also included in the “Non-District” category. Totals include attendees with no affiliation so may be larger than District staff and Non-District together.

Spring 2007 - School Study Groups

The school study groups also began their work in spring 2007. Although not all high schools participated in school study groups, the Ed Fund made certain that a variety of types of high schools did—2 large career technical education (CTE) high schools with city-wide admission, 7 large neighborhood high schools, and 1 small neighborhood high school. Initially the plan had been for the school study groups to involve community, students, and parents as well as school staff. Instead, the Ed Fund followed the advice of some community leaders and did not invite parents, community members, and students because of a concern that they might not feel comfortable expressing their opinions in groups dominated by school staff.

The Ed Fund trained facilitators, who came from both inside and outside the District, to lead each group. Because Anchor 1, which focuses on teaching and learning, is so fundamental to schools, all school study groups were to reflect on that anchor and make recommendations for improvement. Each school team was also to select and reflect upon a second anchor pertinent to its school. Out of the 10 school study groups, 7 focused on Anchor 5 (career pathways and rigorous preparation for college) and the remaining three schools focused on Anchor 4 (small supportive, rigorous schools and/or communities). Because the schools teams were encouraged to identify the anchor most relevant to each of their schools, and their selections clustered around 2 other anchors in addition to Anchor 1, the work of these study groups did not inform the Blueprint in all anchor areas.

In June 2007, 25 representatives from 8 of the school study groups came together to report on their work. This collective reporting, along with school reports from each of the 10 schools, formed the basis for a summative report, drawn together by Ed Fund consultant, Dr. Smith.¹² During the summer an additional 5 high schools took part in a condensed 3-day school study group experience. The summer school study groups also produced a set of recommendations, this time for each of the five anchor areas, which were summarized in a report by Mr. Adorno.¹³

¹²http://philaedfund.org/sec_ed/files/SBSG_June.pdf

¹³http://philaedfund.org/sec_ed/files/SBSG_Aug.pdf

The school study groups contributed to the Blueprint planning process' authenticity among school-based educators. They were another indication that the process would acknowledge the insights of those who work in schools. They also communicated the belief in the importance of the inclusion of those who implement reform. One close observer who was initially skeptical about this part of the planning process commented, "I am a believer now in the school-based process because you can't do things to people, they need to be part of it, but I am [still] concerned about how it all gets laced together."

Spring 2007 - Anchor Work Teams

The five anchor work teams also got underway in spring 2007. Dr. Jones and the Ed Fund identified the "internal" (District) and "external" facilitators for each of the five anchor work teams. Many of the external facilitators were from the partner organizations and all of the facilitators came to this effort with a substantial prior history of working with the District. Dr. Jones assumed responsibility for the anchor work teams.

The composition of the anchor work teams varied significantly. Some had internal-external facilitators with previous experience working together, while others were brought together for the first time as co-facilitators. In some, the work started with one facilitator, before the co-facilitator was selected. With the exception of the external facilitator, some were composed entirely of District staff, while some had a mix of District and external participants. In some, the participants were consistent over time while in others new members joined well into the process and/or the level of participation of individuals varied over the time the group was meeting. The anchor work teams also varied in number of participants and number of meetings. Two of the anchor work teams were formed from previously existing groups with members that had an established history of working together and predetermined shared agenda.

Goals of the anchor work teams also varied considerably; as did the kinds of data they used to make their recommendations. For some, the goal was to identify new strategies for improving ongoing efforts, while for others the goal was to devise innovations. The types of data used by the groups were also variable because their access to data varied and they had different understandings about what data were available to them and/or were appropriate to their task. One participant expressed her frustration gaining access to data she believed her group needed stating, "An anchor team should not have to bang on the District's door just to get data."

As the anchor teams proceeded, each worked largely in isolation from the others. Without cross communication the individual anchor teams lacked a sense of the overall direction of the project. One anchor work team co-chair described her experience this way:

There wasn't enough articulation between the heads of each anchor. We sort of didn't know exactly what the other ones were doing or what the format was going to be so we were collecting data without a real knowledge of where we were going with it.

The anchor work teams concluded their work in summer 2007 with written reports that made recommendations for the Blueprint. Dr. Jones combined the anchor work team recommendations into one report, which was made public in fall 2007.¹⁴ Most anchor work teams considered their work complete that summer, but two continued to meet, one because its work could not be completed without additional data gathering, and the other because the members thought additional tasks might be assigned to their team.

Summary of First Wave Planning

This wave of planning continued under the duress of fiscal crisis. By early spring 2007, the Chief Financial Officer resigned, and soon afterwards, CEO Vallas resigned and an interim CEO was appointed. For months there was speculation about whether Chief Academic Officer Dr. Gregory Thornton, who had ultimate District responsibility for the Blueprint planning process, would remain in the District. In summer 2007, Dr. Thornton left for a new position. Just before his departure, he hired

¹⁴http://philaedfund.org/sec_ed/files/anchor_reports.pdf

Naomi Housman as Executive Director for Secondary Education Reform. By summer's end the SRC Chair, Mr. Nevels, had also resigned. The Governor appointed another Commissioner, Ms. Sandra Dungee Glenn, to replace Mr. Nevels as chair of the SRC. The turmoil, jockeying for position, distractions, and work burdens of a District in fiscal crisis and leadership transition meant the planning process lacked direction from top-level District leadership during this period.

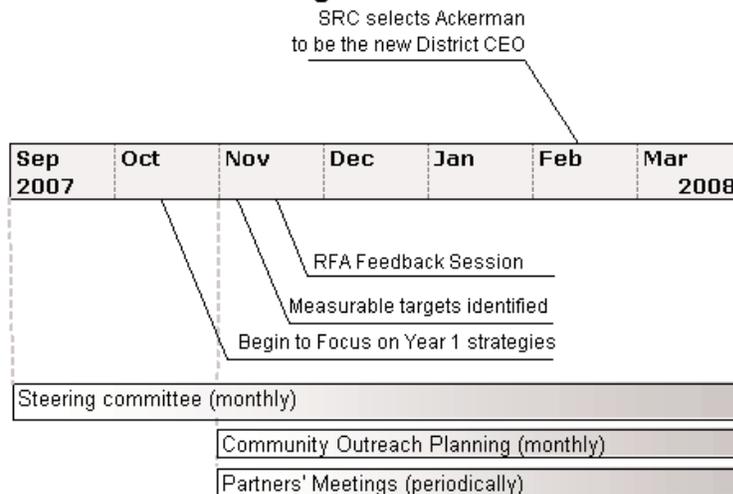
Collaboration between the District and the Ed Fund at this juncture was limited. The anchor work teams and the school study groups ran along parallel tracks, although both concentrated on making recommendations in the five anchor areas. The five anchors focused the groups such that their recommendations would build on past high school reform initiatives of the Vallas era. An important goal for the planning process was to bring about better alignment of District and partner efforts in future reforms. The co-conveners hoped that including partner groups in lead roles in the anchor work teams, and inviting school staff to participate in school study groups would help reach this goal. In interviews, participants indicated that this participatory process was creating a sense of inclusion among an array of stakeholders in the planning process and the recommendations of the anchor work teams reflected priorities of many of the partner groups.

Anchor and school study groups were directed to not let costs constrain their recommendations. At a later stage, the District's financial office would cost out recommendations to determine what the District could pay for and what money would need to come from outside sources. It was hoped that a Blueprint for reform would attract new public and private funds to improve the District's high schools. Thus, despite the difficult District environment in which the planning was unfolding, the anchor work teams and school study groups completed their work. There was an overall sense among participants that the work of these groups reflected a range of perspectives from central and regional offices, schools, and external stakeholders. Multiple sets of recommendations had been compiled with which to shape a five-year Blueprint.

Second Wave Planning Activities: September 2007—March 2008

The second wave of planning activities was characterized by 1) the recalibration of planning activities around measureable targets that would show evidence of improved outcomes for youth and 2) a focus on detailing plans for Year 1 (2008-2009). This period also saw the introduction of new planning structures (partners' group and community outreach group) and the development of a more cohesive team of District and Ed Fund co-conveners. RFA provided feedback to the co-conveners in November 2007, focusing on the ideas generated in the Anchor 1 work team and in the school study groups for improving teaching and learning. RFA also introduced a portfolio of schools as a potential model for the system of schools being created in Philadelphia. Timeline 4 shows the continuing District changes (above) and the major planning activities (below).

Timeline 4: Second Wave of Planning



During the second wave of planning, forward progress was facilitated by growing cohesion among the co-conveners, a set of concrete recommendations from the anchor work teams and school study groups with which to work, and the introduction of a set of targets by which high school improvement could be measured. Most importantly, with the hiring of Ms. Naomi Housman as Executive Director for Secondary Education Reform, there was a designated District staffer to lead the planning. Ms. Housman, who had come from a national high school reform organization, added to the team knowledge about high school reform in other districts. The overall District environment, however, continued to be a discouraging one; the deficit crisis continued and cuts in the central office continued, including, eventually, the elimination of the Office of Secondary Education. Nonetheless, the SRC members selected a new District CEO in February 2008 - Dr. Arlene Ackerman.

Fall 2007- Reconvening the Steering Committee

In September 2007, the steering committee was reconvened. The co-conveners, however, were not in agreement about its composition. One co-convenor, for example, believed that they should “lock up” the steering committee so that its monthly participants would be a consistent group that could engage deeply with, and lead, the formation of the Blueprint. But “the pressure from our planning group was to keep it fluid in order to make the process transparent.”

The steering committee was left open which helped to maintain the participatory character of the process but that decision created other challenges. Attendance at the steering committee meetings varied and the balance between District personnel and external representatives was unpredictable (see Table 2, Steering Committee Meeting Attendance on p.18). Repeatedly, the co-conveners felt compelled to bring first-time participants into the loop. In the end, the decision to leave participation in the steering committee fluid shaped its purpose, which became, as one co-convenor observed, to serve as a locus for public engagement, where feedback on the Blueprint was given, including critique of emerging plans.

At the September steering committee meeting, Dr. Jones and Mr. Adorno presented the recommendations generated by the anchor work teams and school study groups. By the October meeting, several task forces were working to create a vision and mission statement for the Blueprint. At the October steering committee meeting, the co-conveners announced that in the short term the steering committee would focus on identifying recommendations for Year 1, in order to be able to include these in the 2008-09 school year budget. The steering committee determined that the focus for Year 1 would be the 8th to 9th grade transition and improving the 9th grade experience, reflecting local and national research findings which identified success in 9th grade as key to persistence to high school graduation. This focus on 9th grade was also similar to high school reform priorities being promoted in other urban school districts.¹⁵

During the second wave of planning, the Ed Fund hired a new staff member to do communications and administrative work for the project. Minutes were circulated in a timely fashion, along with agendas, to anyone who had ever participated in the meetings. The minutes were also posted on a website, thus helping to create greater continuity for participants between meetings.¹⁶ As one high school principal who was an intermittent participant reported, the circulation of the minutes along with periodic reports provided by Mr. Bichner at principals’ meetings kept her informed of the process:

I attended the first 3 steering committee meetings, and then I missed meetings, and did not go back. ... but Paul Adorno still sends me the emails, even though I stopped coming to the meetings. And Al {Bichner} shares at principal meetings.

The Ed Fund website gave access to the planning process to anyone who was interested in the project’s primary documents, planning timelines, and contact information. In expanding its communications

¹⁵Neild & Balfanz (2006); Allensworth, J. & Easton, E. (2007). *What Matters for Staying On-Track and Graduating in Chicago Public Schools*. Chicago: Consortium on Chicago School Research.

¹⁶See http://philaedfund.org/sec_ed/index.htm

about the project, the Ed Fund played an important intermediary role, encouraging dissemination of information among the District's central and regional offices, schools, and the public.¹⁷

In the steering committee meetings, three concerns repeatedly surfaced. First, when a proposal for Year 1 plans was reviewed, students expressed a concern that too little attention had been given to instruction. Over the course of the planning process, concerns about the strength of recommendations for improving instruction and student engagement kept resurfacing. Second, concerns about access to, and varying interpretations of, what counts as data recurred. Some participants were concerned that not enough data, or not the right kind of data were being considered by the steering committee, and, as one participant explained, when priorities were being determined “there wasn't any criteria for how [we] picked things.” This participant went on to describe her frustration about the availability of relevant data:

From the very first meeting I asked about what data we were looking at....In each of our small groups we talked about and wrote up what kind of data we needed. And the next meeting we still had no data. People had all these theories about what we needed to put more money into. We need more counselors. Can we talk about what the current distribution of counselors is? Can we talk about whether or not attendance is any better at schools that have better counselor/student ratios? Whether or not safety is any better? I and others have asked about data. I was told yes, we'll bring the data next time. .. {but} I've yet to be at a meeting where any data is shared about student performance, attendance, resources.

A third concern expressed by members of the steering committee related to the degree to which the Blueprint planning process appeared to be coordinated with other District high school initiatives. Although the co-conveners were trying to build connections with central office departments and other initiatives that would have an influence on high schools, this was not apparent to steering committee members. One participant, for example, made the following observation about the disconnect she felt between the steering committee and other planning activities going on in the District.

I thought it was going to be more connected to other planning processes. Charter schools, CAII, teacher quality. We haven't talked about teacher quality except to say that we need more PD {professional development}. We haven't talked about the variety of schools in Philadelphia.

Despite shortcomings, the steering committee became a mechanism during the second wave of planning through which the co-conveners were able to build themselves into a team. As fall 2007 progressed, the Ed Fund and District co-conveners' roles became more clear and the planning process picked up momentum. With the addition of Ms. Housman, the co-conveners were able to start scheduling regular meetings between steering committee meetings. These between-meeting meetings became what ultimately “steered” the overall process. As one co-convenor explained “[At the between steering committee meetings] we're [Ed Fund and the District] taking what we're hearing and making sure it's reflected in the decisions we're making. It's a loop.” In addition, during this phase of planning, Dr. Jones, who had been appointed interim CAO, and Dr. Carol Fixman, the Executive Director of Ed Fund, began to regularly meet with Dr. Candace Bell of the William Penn Foundation which assured greater District-Ed Fund coordination and Dr. Bell started to attend the steering committee meetings.

¹⁷Honig, M. (2004). “The New Middle Management: Intermediary Organizations in Education Policy Implementation,” *Educational Evaluation and Policy Analysis*, 26(1), pp. 65-87.

Fall 2007--The Measurable Targets

In November 2007, the co-conveners invited all the anchor work team chairs, the partner groups and key District staff to attend a pivotal meeting. As one co-convener observed of this gathering, “We decided to bring all the anchor team co-chairs [together with the district and other partners]. It was a true turning point because it was an opportunity for everyone to come together. . . . The participation was strong. The enthusiasm was strong.” It was at this meeting that planning participants identified measurable targets for assessing the success of the Blueprint in improving outcomes for youth.

Table 3: Blueprint Measurable Targets

Target 1	Improve the on-time promotion rate grades 6-12
Target 2	Improve the 9th grade on-time promotion rate
Target 3	Increase PSSA achievement at proficient and advanced
Target 4	Increase the high school graduation rate
Target 5	Re-Engage out of school youth
Target 6	Increase readiness and success for postsecondary and career pathways
Target 7	Improve school climate

During the November meeting, Dr. Warren returned to Philadelphia to share the experiences of other high school planning processes. In planning the visit, she had communicated to co-conveners the importance of establishing measurable targets by which the success of high school improvement efforts could be assessed. She re-emphasized this point in her presentation to the group.

In the Carnegie work, the successful cities were those able to focus, having clear targets, and narrowing the field of their endeavor and harnessing their efforts in a strategic manner. It is important to remember: “If you don’t know where you are going, you are not likely to get there.” Having a set of measurable targets creates a relationship around accountability, allowing for a discussion between the central office and schools, in which schools are accountable for results and central office for the resources the schools need to achieve these results. If there are no targets, then there is an empty equation. The school districts that have moved have had clear targets.

The co-conveners posed some potential targets to the group, which were discussed until agreement was reached on seven. (See Table 3) With that, the group began to recast the anchor work team and school study group recommendations as strategies and action steps aimed at reaching the measurable targets, focusing on the first year of implementation (2008-2009) on Targets 1 and 2 to improve the transition from 8th to 9th grade and the 9th grade on-time promotion rate. As the planning moved forward, the partner groups began to play a formal advisory role to the co-conveners, through monthly partner group meetings. They advised on decisions related to the development of strategies and actions for reaching all the targets. It was in a partners’ meeting that the following criteria for determining the strategies and actions was established: a strategy or action needed to have a research base and also address an issue that had “bubbled up” from the school study groups. As one staff from a partner group explained, “[The planning] is about building trust with people that these are the right things to do.” With the deadline for 2008-09 budget decisions rapidly approaching, the planning for Year 1 took precedence over planning for the full five year plan. The initial goal was to communicate priorities for Year 1 funding to the SRC by December 2007. However, the deadline for submission to the SRC for budget consideration was extended as the SRC focused on hiring a new CEO and resolving the budget deficit. The intensity of Year 1 planning took priority over all other work on the Blueprint during the winter months; this enabled the Ed Fund and the District to refine a process of vetting ideas, as well as

to develop a visual template for representing the targets and their related strategies and actions. It also brought the co-conveners into the District’s overall budgeting process. Given the reality of the District’s financial situation, it seemed likely that only low cost strategies would gain SRC approval for 2008-09.

Fall 2007- Community and Parent Participation

A few community and youth groups were regular participants in the steering committee and, throughout the process, District staff invited parents encountered through other District initiatives to attend. Thus, despite attendance at the steering committee being open, outreach to parent and youth constituencies were limited and the steering committee did not become a major venue for their participation. (See Table 2, Steering Committee Meeting Attendance on p. 18). One co-convenor reflected, “Even though we kept [the steering committee] fluid and a lot of people came, it didn’t solve the problem [of having parents and community groups represented]. We didn’t have enough outreach. We needed more intentionality around that.”

Public outreach with the Blueprint, however, had always been part of the plan, and by late fall 2007 enough work had been accomplished that the co-conveners were ready to dedicate time to greater community outreach. Communities in Schools (CIS), one of the partner organizations, was invited by the co-conveners to play a leadership role in this outreach, and CIS staffer Ms. Nafeesah Torpey drew up a plan for the outreach which would take place in spring 2008. However, the co-conveners determined that the CIS plan was too costly to implement and Ms. Torpey was asked to scale it down. Simultaneously, the District began to plan outreach with its state-mandated five-year strategic plan. Rather than launch two community outreach efforts, the District requested that outreach planning for both be done in concert.

Mr. Jim Scott, Director of Family, Community and Faith-Based Initiatives for the District, co-led the planning for community outreach, with Ms. Torpey from CIS. The Ed Fund staff (Adorno and Armstead) and District staff (Bichner, Chivis, and Housman), all of whom were co-conveners of the Blueprint planning process, attended these meetings, which occurred nearly monthly, from November 2007 through April 2008. Other District staff involved in other aspects of the strategic planning process also intermittently attended these meetings, as did a few members of community-based groups and one university representative. (see Table 4)

Table 4: Community Engagement Meeting Attendance

Date	Co-Conveners (District & Ed Fund)	Other District Staff	Community Groups	Other	Total
12/07	5	5	5	4	19
01/08	2	5	6	5	18
02/08	3	7	3	4	17
03/08	2	4	1	3	10

Based on available sign-in sheets from 4 of 5 community engagement meetings. “Other” includes parents, partner groups and universities.

The co-conveners had intended for the public engagement around the Blueprint to solicit input from parents and other community members. However, once the Blueprint and strategic planning outreach was combined, the focus became to develop a communications plan that the District could use whenever it needed to relate a message to parents and others. As one participant in the outreach committee noted, “These meetings are not about how to plan real engagement, about how the District could create opportunities to listen to parents and other citizens about their ideas. They are about how the district can get its word out.” The previous year and a half had made it abundantly clear to the District that it

needed to improve its communications with the public. The District was met with significant push back from parents, youth, and community members when it proposed budget cuts and contract renewals for school management providers without public discussion.¹⁸ In light of these experiences, one co-convenor of the Blueprint process noted that his “greatest fear is that this whole plan will go before the SRC and parents will say, ‘What plan? Why weren’t we involved?’” Another co-convenor reflected that the outreach planning had two objectives, “First, to create better mechanisms to inform people of meetings and information, and second, to re-think how meetings are run in order to make them more participatory.”

Some members of the community outreach committee believed that in order to develop successful outreach strategies, the group needed to involve a wider group of community organizations in the planning itself. However, in the opinion of one Blueprint co-convenor, the effort made to engage a wider group of public education stakeholders was limited because some District personnel strongly preferred to meet during regular work hours. A small number of individuals representing community-based organizations did attend the meetings, but they neither represented the different geographic regions of the city, nor the range of racial and ethnic groups that the District serves.

A series of public meetings in which both the District’s strategic plan and the Blueprint would be presented were planned in each region. However, these plans were put on hold indefinitely when the interim CEO gave priority to regional meetings about budget cuts and hiring of a new CEO. Once the SRC hired Dr. Arlene Ackerman as the new CEO, the co-convenors felt that it would be premature to roll out the Blueprint until she had a chance to “put her imprint on [it].”

Summary of the Second Wave Planning

The turmoil in the District did not abate during this phase of planning activities. Nonetheless, the second wave of the planning process was marked by three positive developments. First, the focus of the planning work shifted from the five anchors to establishing measureable targets for outcomes for youth, which became the organizing principle of the Blueprint. The development of strategies and action steps for reaching the targets helped to weave together the recommendations from the anchor work teams and the school study groups into a comprehensive plan. Through the steering committee and partners’ meetings, the co-convenors achieved agreement around the targets, strategies and actions. Second, the Ed Fund and District co-convenors made great strides towards becoming a team, which was reinforced by the addition of Ms. Housman, the District person who was designated to lead the project, which relieved some of the stress on other District staff members who had many other obligations. In this second wave of planning, the co-convenors worked more cohesively and were able to coordinate their efforts to a much higher degree than they had in the previous wave of planning. Several of the co-convenors reflected on the ultimate importance of building a strong Ed Fund-District collaboration, especially for long-term planning.

It’s really about collaboration. We each bring a different skill set and perspective. The Blueprint has all these arms and legs to it. Each of us has a different perspective and each of us can relate to a different constituency. ...

{Having a team helps to} balance between immediate planning and long term planning. The team has made it possible to do both at the same time.

Some of the bats have come off. It’s not {the Ed Fund} over here, District over there. ... We’re more proactive—not everything being checked out with the party line.

And third, in this second phase co-convenors and partners began to plan for broader public engagement. However, because of logistical and financial considerations, the outreach around the Blueprint was linked to the District’s outreach for its five-year strategic plan. This linkage constrained the

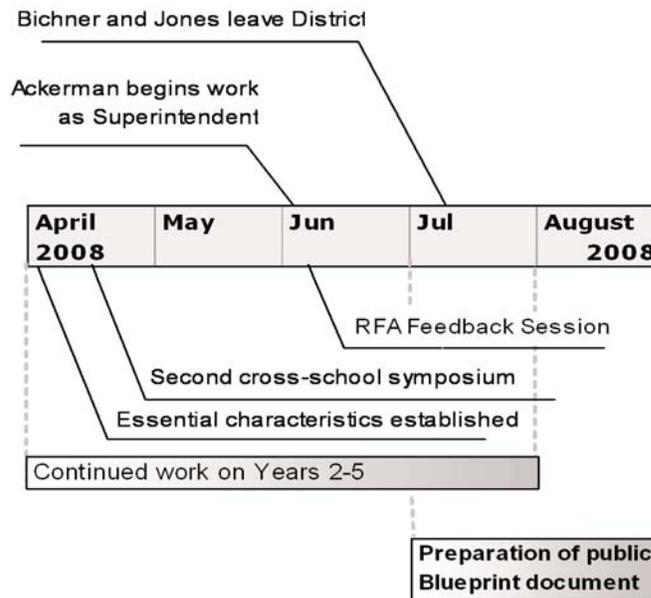
¹⁸In 2002 the District contracted with 3 Educational Management Organizations (EMOs) (for profit organizations), 2 non-profit organizations and 2 area universities to manage 46 low-performing elementary and middle schools.

Blueprint outreach to a narrower goal than had initially been intended by the co-conveners. Additionally, public outreach was delayed as other District priorities—such as outreach about budget cuts and the search for a new CEO—took precedence.

Third Wave Planning Activities: April 2008 - present

This final phase of planning saw the completion of a five-year planning document (the Blueprint) and its preparation for public dissemination. During this period, RFA met with the co-conveners to discuss preliminary findings from the documentation of the planning process. Timeline 5 indicates the major activities contributing to the final plan.

Timeline 5: Third Wave of Planning



The third wave of Blueprint planning was ongoing as of the writing of this report. During this phase the planning moved from the intense focus on Year 1 to filling in details for Years 2-5. Additionally, the planners worked on identifying the essential characteristics of successful secondary schools and re-engaged a broad group of school-level personnel in the planning efforts. The co-conveners collaborated with District departments, such as facilities and operations, and connected with other District projects, including other high school initiatives and planning for schools in Corrective Action II (schools that have not made Adequate Yearly Progress (AYP) for 5 years), so as to assure intra-District alignment with the Blueprint. This period is also one in which the District welcomed Dr. Ackerman who began to assess the District and decide what changes she would make. The co-conveners continued to delay the roll-out of the Blueprint to allow Ackerman time to review and adjust the plan. It was decided that the plan would be presented to the SRC and the wider public in fall 2008. (This did not occur and the Blueprint became part of the District's Strategic Planning process in December 2008.) In the meantime, select aspects of the Year 1 plan—those that were judged to be largely “cost neutral”—were prioritized. These focused on student transition from 8th grade to high school and increasing supports in the 9th grade year.

Spring 2008 - Essential Characteristics and Principles Guiding Instruction

In March 2008, the co-conveners invited another national expert on high school reform to Philadelphia. Dr. Warren Simmons, the Executive Director of the Annenberg Institute for School Reform at Brown University and former Executive Director of the Ed Fund, spoke with the co-conveners and other District officials and presented to the steering committee. At the steering committee meeting he pointed out that shared basic assumptions had driven high school reform efforts in other cities, as well as a set of principles about the kinds of instructional programs and learning environments that are most beneficial to today's adolescents and young adults. His presentation challenged steering committee members to clarify the assumptions—later called the essential characteristics—driving Philadelphia's Blueprint. Simmons' presentation also challenged the group to consider the depth of agreement among planning participants on instructional principles.

Following Dr. Simmons' presentation, a task force was set up to work on defining the essential characteristics underlying the Blueprint. At least one highly involved steering committee participant raised the concern that developing these toward the end of the planning process provided a rationale for the strategies and actions after they had already been adopted. She argued that the essential characteristics should have been decided first so as to ensure alignment between the strategies, action steps, and a clear theory about school improvement. However, a co-convenor offered a somewhat contrasting perspective, stating that while finding agreement on essential characteristics at the outset of the process might have been preferable, circumstances did not permit this. "We've come to our [essential characteristics] inductively, and not top down." The co-conveners believed that articulating the essential characteristics would be useful, even if they would have preferred having established them earlier in the process.

Table 5: Essential Characteristics

◆ Equity and Access
◆ Challenging & Engaging Classrooms
◆ Personalized Learning Environments
◆ System-wide Professionalism
◆ Shared Leadership and Accountability
◆ Aligned Academic Standards

For a more detailed list, see http://philaedfund.org/sec_ed/files/ess_char.pdf

There was also a recurring concern in the steering committee and partner meetings about how deeply District staff and others agreed on principles that should guide instruction. Work remains to be done to clarify a shared set of guiding instructional principles for how best to prepare adolescents and young adults for post-secondary educational or career opportunities. On the other hand, one veteran observer of District reform efforts noted that the planning process had helped introduce a new approach to teacher professional development, considered by most to be the primary vehicle to improving instruction. She believed that as a result of the planning process, future professional development would likely include a "gradual release of responsibility" in which the central office would, over time, reduce requirements for mandated professional development, to allow "authentic requests from schools for professional development" that reflected the needs of each particular school community. This, in turn, would contribute to building school-level professional communities that would hold themselves accountable for improvement in student outcomes.

Spring 2008 - Continued Planning for Years 1-5

During the third phase, as implementation plans for Year 1 continued to move forward, the co-conveners began to develop strategies and action steps that would be implemented during Years 2-5. The steering committee members offered feedback on the plans that the co-conveners developed for all five years.

In April 2008, the co-conveners organized a second cross-school symposium (the first being the Launch event in January 2007) which included teams from 47 high schools and 8 middle schools. At the symposium, school staffs were introduced to the full plan to date. Activities organized for school teams were designed to collect feedback specifically on the implementation plans for Year 1. The two symposia, along with the ongoing communication with principals at District principals' meetings and through email created an inclusionary feeling among those high school principals interviewed. In the words of one principal, "I think, but I'm not positive, that there has been greater voice by principals, teachers, and community partners than in the past." Still, some school-based participants worried that awareness of the planning process did not have enough reach into school faculties. As one teacher explained, "The principals are aware [of the planning process] I think. I think there is very little awareness among staff."

Planning for Year 1 ultimately collided with the District's fiscal troubles. In May 2008, the decision was reached to prioritize a few of the Year 1 strategies and to present these to the SRC. One District co-convenor identified this as a turning point in the planning process. "We had a meeting where we decided to push 4 recommendations instead of nine. The criteria for selecting the strategies are that they were cost neutral and leveraged current resources." (Table 6 shows the original and prioritized Year 1 strategies) This experience reinforced fears that the co-conveners had all along—namely that the expectations for change created by the planning process might be thwarted by resource shortages. As one co-convenor explained, "My fear with resources is that we can't deliver." The frustration of thwarted expectations became real when the prioritization of Year 1 strategies met pushback by some participants at a steering committee meeting. And without an approved full five-year plan, it was impossible to tell whether the Blueprint would succeed in helping the District attract new money for high school reform.

Table 6: Year 1 Strategies

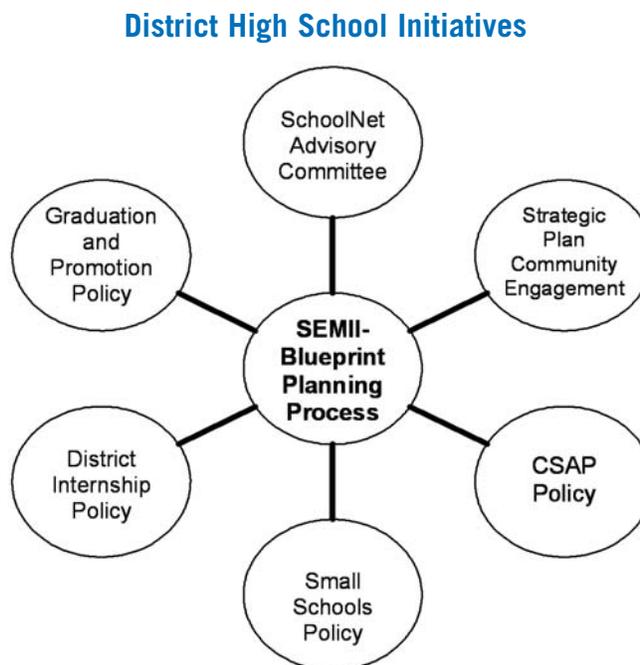
ORIGINAL YEAR 1 STRATEGIES	PRIORITIZED YEAR 1 STRATEGIES
Conduct summer academy for rising ninth grade students	Orientation for rising 9th grade students
Conduct orientation sessions for parents of incoming ninth grade students	Create online graduation tool
Develop individualized graduation/transition plans for all rising ninth grade students	Create conditions for personalization
Create an early warning system for grades six through nine	Infrastructure for coordinated, strategic supports for success through and beyond high school
Establish four-year advisories for all high school students	
Establish student success centers to provide coordinated strategic supports for all high school students	
Pilot small schools conversion at neighborhood high schools	
Intensify instructional focus on literacy skill development across the ninth grade curriculum	
Establish a re-engagement center for out-of-school youth	

Source: http://philaedfund.org/sec_ed/files/Year_one_timeline.pdf

Spring 2008--Blueprint Alignment with other District High School Initiatives

As the co-conveners continued to work on the full 5-year Blueprint, the importance of it aligning with other District offices and initiatives became increasingly apparent. Often, the co-conveners worked behind the scenes to bring about this alignment, and in some instances were successful. Still, as mentioned earlier in this report, it appeared to many steering committee members that important initiatives and central office departments were disconnected from the Blueprint. As one participant commented, “The steering committee is almost working in a silo. There are places in central office that the Blueprint can impact and these staff members are not at the meetings, like facilities, the CAII schools. Are the EMOs at the table?”

The graphic display of District High School Initiatives indicates the areas in which the co-conveners worked to build linkages and create greater coherence between the Blueprint and other ongoing District work.



In retrospect, the staff of the Ed Fund reflected that a lesson they learned was that in order to counteract the bureaucratic organization of the District and its tendency to departmentalize and inhibit collaboration and alignment, it was important to regularly “scan the environment” or “ferret out where the action is and who is directing that action” to be “able to be part of the process and the conversation.”

Summer 2008—Creating a public Blueprint document

During summer 2008, more leadership changes occurred - both Mr. Bichner and Dr. Jones left the District. Nonetheless, the remaining co-conveners worked to complete the public Blueprint document. As of fall 2008, the Blueprint was pending the review of Dr. Ackerman. The expectation is that the planning process will conclude in fall 2008 to be followed by the implementation phase (as mentioned earlier, in December 2008, the Blueprint was a key document in the District’s strategic planning process).

The Blueprint offers a work plan for the District and its partners. It details the data or research that supports the claim that each of the seven targets is important for improving secondary education. It outlines strategies and action steps for reaching the targets over five years, assigns responsibility for implementation, names sources of data that should be used to monitor progress toward each target, and articulates the next steps needed to refine the work connected to each target. In the Blueprint document, strategies are described both in the context of past reforms that they build on and future changes to the system that will have to be introduced.

The draft is specific in indicating a sequence of actions around which District and partner efforts need to mobilize to achieve the targets. The draft includes strategies that address;

- new supports for the transition from 8th to 9th grade and for 9th graders,
- school climates that encourage personalization,
- curriculum, instruction and professional development geared to engage students, meet state standards, and build 21st century skills,
- alignment within the District, and between the District and external partners, to improve educational opportunities for all young people,

- use of early warning indicators of students at risk of not graduating and supports and interventions to help students stay on track to graduation,
- multiple educational pathways for youth, including programs for reengaging out-of-school youth, and improved systems for communicating with parents and students about school options,
- and greater coordination with post secondary academic and career opportunities, including dual enrollment and trade certification programs.

Two cross-cutting strategies have been identified as important to the success in reaching the targets;

- building District capacity through strategies that nurture professional learning communities at multiple District levels,
- building civic capacity through strategies that create shared community ownership for the plan and for improving secondary education.

Remaining Questions

The co-conveners have identified two immediate tasks. First, they believe it is important to establish a stakeholders' group to monitor implementation. And second, they believe it is important to conduct outreach with the Blueprint to parents and the broader Philadelphia community. Once familiar with the plan, the co-conveners hope parents and the broader public will advocate for it, as well as provide input that will continually refine and improve it.

This next phase of planning will raise a new set of questions about the Blueprint:

- What kinds of human and financial supports are needed for the District to implement the Blueprint?
- What are the implications of the Blueprint for the way central office, regional offices and high schools are organized and relate to one another?
- To what extent has the process built the shared District, political, and civic commitment to the Blueprint that is needed for it to be sustainable?
- Are the strategies and actions in the Blueprint robust enough to bring about change and improvement at the scale and scope that planning participants hoped for?
- Was the process successful in fostering the relationships and building the infrastructure needed to hold the District and its partners accountable, including making adjustments to the Blueprint when warranted?
- Did the planning process strengthen the collaborative skills of planners and partners who will need to collaborate throughout the implementation process?
- Do the targets prove to be sufficient measures of progress? What are the benchmarks, or intermediate measures, of progress toward improvement?
- How will the plan be effectively communicated throughout all the schools and organizations that contributed to it and will be impacted by it?

Accomplishments, Challenges, Dilemmas—and Next Steps

This section of the report reflects on some of the important accomplishments, challenges, and dilemmas presented by the planning process. As reflected in the story above, the Blueprint planning process occurred in an environment challenged by District leadership transition and ongoing fiscal crisis. The ability to persevere in this climate, in large part, is testimony to the strength of the relationships among those both inside and outside the District, who care deeply about high school reform and the success of the Blueprint planning process. The accomplishments, challenges, and dilemmas have implications for next steps in the planning process, which we discuss below.

Accomplishments

Created a Participatory Process

The most agreed upon accomplishment of the planning process was the belief among many who were part of the planning that it was a participatory process, engaging people from both inside and outside the District. One interviewee remarked, for example, about the steering committee, “Something that’s unique about it is that it brings in all people—parents, administrators teachers, students, people from outside, people like Warren Simmons.” There were several different reasons given for why such broad participation was important.

First, a participatory and inclusive process was considered important because the plan itself would benefit from different perspectives on how to improve high schools. Importantly, wide participation and multiple perspectives could help District staff consider the “big picture,” and think more broadly about high school improvement. One participant and central office staff member commented,

It has to be a collaboration. All of the external partners have to be involved: parents, teachers, supportive organizations, like CIS, PEF (the Ed Fund), and any other organization that has a significant role in the district. Even though they are outside, they have a lot to offer because they have a different perspective. Sometimes we can't see the forest for the trees. Partners need to feel that they are valued and they help improve the lives of their students. I have increased respect for the partners.

Second, broad participation was considered important for political reasons. Within the context of the District’s financial difficulties, the hope was that broad participation would lead to wide public support for the plan, and that this support would translate into advocacy for city and state resources to sustain reform. One co-convenor repeatedly remarked that it was important that the process lead to a “unified voice” about what was needed to improve high schools before city and state officials.

Third, a participatory process was important as the District worked to overcome the charge that it lacked transparency in its planning and decision-making. The belief that the District lacked transparency was held not only among those outside the District. Many school-based staff shared this same point of view. An open and transparent process was considered important to implementation; it would ensure that those whom the Blueprint would affect would accept the plan because they believed their ideas were heard. A central office staff participant reflected,

I think it (the planning process) was an excellent process because we involved principals, leadership teams, partners, and parents got to sit at the table. I think the more people you bring to the table, the more chance the plan will take root. At first I thought, ‘all these meetings!’ But after the meeting with the principals in '07 and the April 12 symposium, I think this is the way to go. It's a plan that has a lot of collaboration. It's crystal clear and transparent. There are no hidden agendas.

A fourth reason was that by including a range of people, and not just making this a “district” process, a better connection was made between the schools and the city. For example, when we asked about the accomplishments of the process, one participant commented, “Bringing people together to talk about really important issues about high schools. Recognition of the problems. Recognition that if we are going to improve the city, then we need to improve the schools.”

A fifth and final reason why a participatory and inclusive process was considered important was that it could generate the civic capacity needed to maintain reform initiatives regardless of changes in District administrations. While it was a huge challenge to involve many kinds of stakeholders, their involvement can itself become a stabilizing force amid the larger turbulence related to administrative and budget crises. Building for sustainability of a set of high school reform initiatives was a major goal of the planning process.

Focused on High Schools and Ninth Grade

Another accomplishment of the process was that participants believed that it brought a long overdue focus on high schools to the forefront of District reform efforts. It was considered especially important that the planning process strongly emphasize the need to examine the transition from 8th to 9th grade and the 9th grade experience, and that it build on past successful experiences, such as with the Johns Hopkins Talent Development initiative. The plan suggests revisiting and scaling up past reform ideas, such as the 9th grade orientation and 9th grade academies, and introduces new reforms, such as tracking student risk factors for dropout beginning in 6th grade, and developing individualized on-line graduation plans for 9th graders.

Creating a real focus on high schools and getting the message out about high schools, getting the message out that we have to change the current structure if we are going to realize any measurement of success for our students.... So that has been a good thing that we do have people looking at what's going on. In terms of the need for an articulation vehicle from middle schools to high schools, in terms of the state of our neighborhood high schools.... in terms of supports that are needed for transition for incoming 9th graders.

The 9th grade transition. There was no pushback (at the Symposium) on that. They all think it's important and they all support whatever we can do to fund it and will support it with the funds they have.

Established a Base for District and High School Reform

In addition to specific targets, strategies and action steps, the Blueprint planning process introduced some of the prerequisites for ensuring that reform actually occurs. These include: identifying a set of essential characteristics that motivate reform; creating greater cohesiveness within the District and among external partners; and creating a stage for conversations about the balance between central office control and individual school autonomy in teacher professional development.

A major contribution of the planning process is the articulation of a set of essential characteristics about the kind of environment required to improve opportunities and outcomes for all students. In the future, these essential characteristics can be the basis for unifying a broad set of internal and external stakeholders around the Blueprint. A next step is for the essential characteristics to be tested with a broader set of audiences beyond the steering committee, to see if they, in fact, unify stakeholders around a common vision and, if so, can help to bring about wide support for the Blueprint.

The Blueprint planning process increased collaboration on high school work both within the District and with external partners. Within the District, the co-conveners have worked to break down bureaucratic divisions and to coordinate departments and ad hoc working groups with the Blueprint process. Ultimately, success in doing this will contribute to the development of a coherent implementation plan, in which structural and instructional changes complement one another, rather than work independently or in conflict with one another. One co-convenor described the role that the planning has provided as the “grease” which facilitates better coordination and the “glue” which will ensure that the different District departments and partner organizations maintain their bonds to each other as they work.

The planning process has also served to create new linkages among the major school District partners. The Ed Fund, PYN, CIS and Academies, Inc. brought their different interests and expertise to the table to forge a plan that addressed the breadth of needs of Philadelphia students and schools. The planning process created the ground for these groups to work in tandem for a broad-based plan that goes beyond any one group's self-interest. In the words of one co-convenor, the process served as a “crucible” in which all these groups began the work of forging a shared agenda. Attention to these relationships will continue to be important if the shared agenda is to move forward.

In addition to increased collaborations among and between District staff and partner groups, each school team that participated gained additional experiences working to explore its vision, practices and

relationships in light of secondary reform research and District expectations. Developing and honing skills in reaching consensus about strategies and actions to achieve improvement targets at the school level is critical to making sure that reforms drill down and affect classroom practice.

Set the Stage for Advancing Professional Development

During the planning process, the need to improve classroom instruction surfaced regularly. Concerns included instructional practices that engage youth, meet state content standards, and include 21st century skills.¹⁹ Professional development was discussed as the means through which to improve instruction and the Blueprint began to lay the ground for a reconsideration of the professional development offered to teachers. The Blueprint process identified the need for a new balance between central office guidance and individual school autonomy in determining what professional development would be offered. The co-conveners considered the idea of “gradual release of responsibility” over a 5 year period as an important means to eventually offering school staffs the opportunity to determine their needs for professional development (rather than the central or regional offices deciding a schedule of professional development). The shift represented by the idea of gradually increasing school autonomy in the area of professional development was to support the forming of professional communities at the school level that could identify and seek help where they need it, and hold themselves accountable for improvement in student outcomes. Education scholar Richard Elmore points out the importance of tying professional development to student needs, so that students are the beneficiaries of professional development.²⁰ Increased school autonomy in determining professional development can be a means for strengthening this linkage. A veteran in District efforts to improve professional development observed that it was an “accomplishment of the planning process that these ideas about autonomy and professional development are on the table.”

Established Measureable Targets

At the November 2007 meeting Dr. Warren help guide the planning group to the development of measureable targets. This was a pivotal moment in the planning process because it helped participants in the planning to understand the import of making their work results-oriented. Consensus was reached around a clear set of measureable targets that can help bind reform efforts among district staff, school staff, parents, community members and partners. Targets can help all stakeholders—adults and students—stay focused on what is expected and how progress will be assessed. In addition, targets help educators at all levels value and utilize the multiple forms of data about students and their progress that is available to them.

Challenges

Expanding and Sustaining an Inclusive and Participatory Process

The participatory planning process included a range of stakeholders with different interests and agendas. The challenge of bringing diverse stakeholders together around a shared set of beliefs and a plan for reform consistent with those beliefs was enormous, and was made more difficult by District instability. As one co-convenor reflected:

One of the biggest challenges we've had is that every person in the SDP {District} and every {external} organization has its own agenda... and they have their own interests. There is overlap sometimes. And the real challenge is not negotiating that but bringing people together for a common agenda...

¹⁹See Fletcher, G (2006). “Using Technology to Maintain Competitiveness: How to Get Our Groove Back” in *T.H.E. Journal*; 33(12).

²⁰Elmore, R.F. , (2004). *School Reform From the Inside Out: Policy, Practice, and Performance*, Cambridge MA:Harvard Education Press.

Despite the challenges, as the planning process was concluding, many District and external players coalesced around the draft Blueprint, setting an expectation among planning participants that a new culture of inclusion around high school reform had started to take root. After the formal aspects of the planning process wind down, a major challenge is to maintain—and even expand—the breadth of inclusion that was established during two years of planning through the implementation phase. Without the maintenance of a participatory and inclusive process, the Blueprint might lose its character as a “living” document subject to the review of a diverse group of committed stakeholders.

The planning process was successful in bringing together a range of stakeholders, but there was agreement among the co-conveners that parents, community leaders, and youth were underrepresented and that the implementation phase needed to include more of these constituencies. Throughout the planning process, the goals that were identified for involving parents, community, and youth were multiple, including soliciting input to the Blueprint, cultivating “buy in” to the plan, and building a public constituency that could champion the Blueprint and help ensure fidelity to the plan. Future work to substantially engage these constituencies might include efforts to ensure representation from different geographic areas of the city, and from the different racial and ethnic groups served by the schools, as well as accommodations such as transportation, childcare, translation, and timing of meetings that might encourage wider participation. Developing criteria by which the co-conveners could evaluate whether outreach efforts have reached their goals for including diverse parents, community leaders, and youth would be useful to this effort and be helpful to the District in other outreach efforts as well.

Making Data Accessible and Clarifying What Constitutes Data for Decision-making

Throughout the Blueprint planning process, data and research were a topic of discussion. In the grant proposal, the Blueprint was described as a document that would reflect research-based practices. In the drafts of the Blueprint, the data that each measurable target was based on were stated, as well as the data that would be collected during implementation. Despite this emphasis by the co-conveners on the importance of basing the Blueprint on data and research, some participants, like those cited below, expressed frustration about the data and research used to guide the planning process.

I think some people in the room knew the data and the research... but I'm not convinced that we all did. Some is just principals saying we've been doing this for 30 years and we know what works. I don't know that I buy into that as a rationale.

... I'm not sure they are looking at research based processes, but I hope they are.

The problems with data and research fell into two areas. First, data about the District was difficult to access and therefore was not always available, when requested, to the steering committee, the anchor work teams, or the school study groups. This meant that decisions were sometimes made based more on impressions and the experience of some participants, without the benefit of data that could justify trends or patterns. Second, participants had different ideas about what could be considered reliable data or research. In other words, participants had varying views of District-provided quantitative data, professional expertise offered in anchor work teams and school study group reports, and the “national perspectives” that were articulated in research reports, policy documents, or by consultants.

The challenges related to data and research studies that the co-conveners faced were not unique—they are issues faced both by the city and other organizations involved in reform efforts. The Blueprint itself is built on measurable targets, and to measure these, appropriate, timely, and valid data will be necessary. Addressing the data issues that arose in the planning process are important to successful implementation of the Blueprint and could benefit other efforts in the city as well.

Establishing Mechanisms for Accountability

Developing mechanisms for accountability largely was left to the implementation stage, although at the last steering committee meeting in June 2008 the co-conveners introduced the idea of a smaller group of stakeholders that would continue to meet to monitor implementation. It is notable that during the planning process two different needs for accountability emerged which often were not fully distinguished from each other. First, was the need for accountability for fidelity in implementation of the plan, and second, the need for accountability for achievement of the targets. Establishing mechanisms for accountability that meet both of these needs is important.

There was a range of beliefs among participants about the mechanisms that would assure accountability. Some believed that the diverse group of stakeholders involved in the process was a means for holding the District accountable for implementation, while others thought that the thorough documentation of the planning process would hold the District to a commitment to follow through on the plan. The targets were seen as measures that could be monitored and that would indicate whether implementation was resulting in improvement. These broad notions of accountability were worrisome to some, however, who believed that the plan lacked an important accountability mechanism in that it was not specific enough about the responsibilities of key District leaders, external partners, or individual schools in meeting the targets.

In order to ensure that the Blueprint brings about improvement, accountability mechanisms for implementation and for meeting targets will need to be spelled out, including the development of benchmarks that would indicate progress toward the targets that have been set. In addition, it will be critical to establish who is responsible for monitoring accountability, and how what is learned will be reported to the public. Developing an explicit plan for accountability is one way to further the inclusive and participatory process the Blueprint planning process has initiated.

Achieving Alignment

Bringing about system alignment within the District and with external partners was an endeavor that concerned the co-conveners at every stage of the planning process. As the planning process progressed, the co-conveners intensified their efforts to ensure that the blueprint planning did not operate in isolation from other District initiatives, but instead was supported by District policies and practices. A change in this pattern requires an alteration in both District culture and practice. If secondary education reform is to engage a broad set of internal and external stakeholders and cohere around a shared agenda, the traditional District patterns of departmentalization and bilateral relations with external groups must be replaced by an intentional effort to coordinate better both internally and with external groups. External groups must also stay alert to the drift toward “private” agreements with the District, in place of joint work around the shared agenda that the Blueprint potentially represents.

Ensuring Sustainability

A great deal of time and effort of many individuals and groups have been dedicated to the planning process. If the plan is never implemented, an opportunity will have been lost, and many engaged stakeholders walk away from the process disillusioned by its outcome, and reluctant to participate in future reform initiatives. Sustainability has been a major challenge to the planning process. Participants in the process have largely considered sustainability in terms of the people and structures that need to be on board with the plan if it is to be sustained. From the outset of the planning process, the co-conveners worried that District leaders, including the SRC, had not fully embraced the planning process. The planning proceeded without this support, lacking the legitimacy and purpose that top District leadership might have offered. The challenge will be to secure the endorsement of the new Superintendent and the SRC, so that the plan may be funded, even in difficult financial times.

The co-conveners hoped that the participatory and inclusive planning process would create champions of the plan. At the final meeting of the steering committee, there was a discussion about a smaller body that would monitor next steps in the planning process and serve in part as champions of the Blueprint's implementation. The next phase will test whether the planning process has created a group of strong

local advocates who can work collaboratively to honor the process and the plan.

Education scholar Cynthia Coburn argues that reforms must take account of how changes in classroom instruction actually occur, must spread new norms, principles and beliefs, and shift ownership so that the reform can become self-generative.²¹ As outreach to all stakeholders about the Blueprint continues, the “big reform ideas” that guide the plan need to be communicated. By so doing, the Blueprint prepares educators and the public to look for evidence of the kind of change in beliefs and norms that Coburn suggests is essential to reform as well as to meet targets. This would assist the broader public and educators—particularly teachers—in becoming “owners of” the reform process, thus making it self-generative.

If familiar with the big reform ideas embedded in the plan, both the public and District educators would be able to champion these ideas, contribute their insights to implementation, and be a receptive audience for evidence indicating whether or not the Blueprint had positively influenced practice. Coburn suggests that this is a necessary exchange between and within classrooms, schools and the District, and, we suggest, with the public as well. This “complex vision” of what reform is could help to provide evidence of progress toward reaching targets identified in the Blueprint (p.8). In this way, an informed public, including educators, could become a powerful force that would contribute to the future sustainability of the plan.

Dilemmas

The dilemmas outlined below are issues that have not yet been clarified in the planning process, and therefore are still unclear in the Blueprint itself. These dilemmas are important because without clarity the ultimate goals of the Blueprint remain elusive.

The tension between “improvement” and “redesign”

Since the inception of the planning process, the notions of “improvement” and “redesign” have lived in tension. The title of the White Paper, *The Secondary Education Movement, Phase II: Redesigning Philadelphia’s High Schools* and some interviews with participants suggested that the planning process might lead to redesign or how to “deeply rethink” high schools to better engage students and to meet the changing needs of the economy. As the process has evolved, however, it has built on the past as the platform for the future, conserving past conceptualizations of high schools as organizations. The urgency of focusing on the comprehensive high schools, because they are the lowest performing schools, likely contributed to the focus on incremental improvement rather than introducing “radical departures.” Similarly, the framework for planning provided by the White Paper, which, in spite of the word “redesign” in its title, sought to connect the Blueprint reforms to the earlier SEM I effort, also contributed to incremental improvement. The District’s fiscal crisis may have further constrained participants as they developed the Blueprint’s plan for high schools. Additionally, one observer of the process suggested that the strong input of District insiders and veteran educators may have helped to push the planning in the direction of improvement, because they tended to think about high schools in contexts already familiar to them.

Much of the national attention on high school reform has emphasized the idea that American high schools were designed for the industrial age, a time when students exited younger to enter factory jobs. Today’s education leaders stress that high schools need to address the information and creative economy, which requires that students not only graduate high school, but also acquire post-secondary education. Young people need the opportunity to learn a different set of skills than they have learned in the past, particularly those related to the use and development of new technologies, what are often called 21st century skills. At junctures in the planning process, participants talked about redesigning high schools to meet these challenges. The Blueprint begins to sketch the ways in which curriculum must change to include 21st century skills by building on on-going pilot efforts currently underway, and touches on

²¹Coburn, C. (2003). “Rethinking Scale: Moving Beyond Numbers to Deep and Lasting Change” in *Educational Researcher*; 32 (6).

how teachers might access new instructional approaches that embrace these skills by shaping professional development to meet these challenges. Strengthening attention to instruction and the redesign of school and classroom environments to enhance the teaching and learning of 21st century skills will be an important part of implementation.

Connecting the Middle Grades to High Schools

The planning process was titled a *Secondary Education Blueprint Planning Process* because the co-conveners recognized the importance of the middle grades to success in high school. Yet, because the process focused on strengthening the high school experience, especially for those attending the large neighborhood high schools, issues concerning the middle grades were left under-addressed. The strongest connection made between the middle grades and high school was the plan to begin to monitor on-time promotion from 6th through 8th grades and to set in process a system of interventions as early as sixth grade for students who exhibit evidence of the dropout risk factors.²² The goal is to have all students enter high school more prepared and therefore less likely to drop out.

Several realities made it difficult to fully incorporate grades 6-8 in the planning. First, as mentioned above, there was felt to be an urgency to address the needs of students in the comprehensive high schools. Second, confining the scope to high schools focused the planning and contributed to making the process a more manageable task. The middle grades are taught in middle schools and K-8 schools and each of these school types face a different set of challenges, which would have complicated the planning process. Third, there is support in the research literature that focused attention on high schools can make a substantial difference in graduation rates.²³ Nonetheless, some anchor work teams focused on developing recommendations for grades 6-12. A District staff member who served on one of these work teams pointed out that the planning process provided “an opportunity for some articulation between the 8th grade teachers and 9th grade teachers.” Looking forward, it will be important to clarify how middle grades education will impact successful implementation of the Blueprint.

The Locus for Improvement: System Level Change and School Level Change

The co-conveners largely steered the planning process toward creating reform at the individual school, rather than system level. This focus was reflected in the essential question guiding the planning process, which was, “What policies, practices, programs and resources need to be in place *in every Philadelphia high school* in order for each high school to award all entering ninth graders a quality diploma four years later?” (Emphasis added.) Nonetheless, as the Blueprint planning process was being launched, there were already conversations about the District being composed of schools with different management models. The most common language used was that of a “diverse provider model,” which referred to Philadelphia’s diversely managed public schools, including charters, and District, EMO and university-managed schools. The language of “multiple pathways” also had some currency. Although the idea of “multiple pathways” was most closely associated with creating opportunities for the re-entry of out of school youth, the idea of multiple pathways was also applied more broadly to connote a system in which students and families had multiple options for meeting different kinds of students’ educational needs. The Blueprint planning process did not directly address the system of schools being created in Philadelphia, nor ways in which the Blueprint might or might not be relevant to differently managed schools, or different types of schools.

An examination of the ways in which different types of schools relate to each other will be another important future step. Concerns about the different types of schools were occasionally raised during the Blueprint planning process. For example, at a steering committee meeting, one participant pointed out

²²Neild & Balfanz, (2006).

²³Allensworth and Easton (2007).

that selective admission and charter schools sometimes send poorly performing and/or behaving students back to their neighborhood schools after the school year has begun. This practice, he explained, can have a very disruptive impact on the neighborhood school classroom. A reconsideration of such practices may be necessary as the Blueprint process proceeds.

A next step in the process could involve greater attention to the system of schools that the District operates. The variety of Philadelphia high schools, which differ by academic focus, size, admissions criteria, and governance structure, suggests that the Blueprint should address whether these different types of schools work as a viable system to provide multiple pathways that meet the needs of a diversity of students. In addition, the variety of high schools may have implications for the ways in which the District's central and regional offices support schools.

Summary of Next Steps

The following summarizes the next steps that were identified in the above discussion of accomplishments, challenges and dilemmas:

- Test the Essential Characteristics that undergird the Blueprint with a broader range of stakeholders than those that served on the steering committee;
- Continue to encourage system alignment around the Blueprint within the District and between and among partner organizations;
- Develop an implementation plan for professional development that balances central office guidance and school autonomy and that expands instructional content and approaches to include 21st century skills and classroom environments appropriate to learning those skills;
- Continue to build the inclusive and participatory reform process, giving special attention to youth, parents and community members, as well as school level educators. Develop criteria for outreach that ensures geographic, racial and ethnic, and socioeconomic diversity;
- Work to ensure accessibility and timeliness of data about District programs and student performance, and to develop a shared definition of what counts as data and research;
- Establish accountability mechanisms for monitoring implementation at the central office, regional and school levels and among external partners and for assessing progress toward outcome targets;
- Develop venues for feedback on implementation and targets for educators, youth, parents, and the broader public;
- Develop ongoing communications documents and systems that educate all stakeholders about the Blueprint and promote two-way communication with stakeholders;
- Revisit the degree to which articulation between the middle grades and high school needs to be addressed to see improvements in high school achievement; and
- Consider both school-level improvement and reforms that improve the efficacy of the District's system of schools in meeting the needs and aspirations of a diverse student body.

Recommendations

In this final section, there are a broad set of recommendations for other districts that may engage in a similar planning process.

- The Philadelphia experience, although particular to circumstances in this city, had broader lessons embedded in it. *In particular, Philadelphia's experience indicates the importance of giving attention to the contextual factors that affect the environment for reform.* Although other districts might not share the same fiscal or leadership crises that characterized Philadelphia during its planning process, every district will have particular contextual conditions which need to be taken into account. Other large districts will also share many of the bureaucratic qualities that made it difficult in Philadelphia to build an “inside-outside” team and to bring about system and partner alignment. Countering these bureaucratic characteristics will be of concern to other planning processes, just as it was a concern in the Philadelphia Blueprint planning process.
- In the current age of standards-based accountability and assessment data, Philadelphia offers a cautionary tale. Districts have been stressed by the need to produce data that indicates compliance with federal and state mandates, including reporting on Adequate Yearly Progress (AYP), the achievement gap, and other indicators key to the No Child Left Behind legislation. *They have not necessarily developed the capacity to respond to data requests from those who are engaged in developing district reform plans.* This needs to be taken into account as “plans for planning” get underway. Perhaps additional supports should be provided to districts to help them retrieve and analyze data as requested and appropriate. Ironically, in Philadelphia—and perhaps elsewhere—the current accountability environment has led to the production of more data, just as fiscal constraints have reduced the District’s capacity to respond to data requests. Those involved in planning must clarify how they will ensure that data will be accessible and timely.
- Finally, other cities, like Philadelphia, do not lack for reform ideas, but lack the public will necessary to implement reform.²⁴ *Like Philadelphia, other cities will need to design a public process which engages a broad swath of public school stakeholders, each of whom has distinct interests, in the creation of a shared reform agenda, and in developing the district and civic capacity to ensure accountability for implementation and outcomes, as well as sustainability of the reform effort.* Importantly, sooner rather than later, political, civic, and business leaders need to expend political and financial capital in the name of a strong public school system, building connections between the future of the schools and the future of urban areas.

²⁴Stone, C.N., Henig, J.R., Jones, B. D., and Pierannunzi, C. (2001). *Building Civic Capacity: The Politics of Reforming Urban Schools*. Lawrence, KS: University Press of Kansas.

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Appendix A

Research Activities

Research for Action conducted a qualitative study in order to understand the dynamics of the planning process. The documentation of the Blueprint planning process included interviews and focus groups, observations of program activities and review of relevant program documents and the website over a nearly two year period, beginning October 2006 and ending in June 2008. The qualitative data analysis focused on identification of important themes and on examination of the multiple perspectives of participants. Data collection included the following:

Observations

RFA staff observed all major components of the Blueprint planning process, including:

- Selected anchor work team meetings (5)
- Selected school study group meetings (5)
- All steering committee meetings (13)
- Community engagement planning committee meetings (4)
- Cross-school symposiums (2)
- City Council public hearing on education (1)
- Blueprint presentations to Cross City Campaign, Home and School, and Education First Compact
- Partners' group meetings (4)

Interviews

In total, RFA conducted 35 interviews (including focus groups) with 45 of the stakeholders (some twice) including:

- Co-conveners, and other District and Ed Fund staff
- Partners
- Anchor facilitators
- Principals
- Steering committee participants

Document Review

- Proposal to William Penn Foundation
- Claniel report
- White paper
- Recommendation reports from anchor work teams and school study groups
- Documents distributed at steering committee, anchor work team, school study group, and community engagement committee meetings
- Secondary Education Blueprint website

Appendix B

The Context for the Blueprint Planning Process—The Destabilizing Effect of Fiscal Distress and District Transition

In October 2006, just as the Blueprint planning process was to begin, the SDP announced a \$73 million shortfall in the budget. The budget deficit shocked many Philadelphians concerned with public education, because a presumed balanced budget had been passed during the summer. CEO Vallas deemphasized the gravity of the situation and insisted that the necessary cuts would not affect schools directly. Nonetheless, in fall 2006 the question of how the District would resolve the substantial deficit preoccupied its leaders. The crisis did not resolve itself easily, the deficit continued to grow, and the crisis mentality created by the deficit lasted throughout the time period of the planning process. The budget crisis created concerns among planning process participants about the scale and scope of secondary education reforms that would be possible given the reality of budget constraints.

The budget crisis tripped a series of resignations of top district leadership. First, the Chief Financial Officer (CFO) resigned, and then, in April 2007, on the same day as the first Blueprint steering committee meeting, CEO Vallas announced his resignation. In May 2007, the SRC named Mr. Tom Brady, the district's chief operating officer to be the interim CEO. This appointment, however, caused controversy; it had been decided without prior consultation among all SRC members, and without consultation with the governor or the presumed mayor elect. Once the dust settled, Mr. Brady lent his support to the planning process, but the length of his tenure was uncertain, and some planning process participants worried that when a new CEO was appointed, s/he would not support the Blueprint recommendations for high school improvement.

Under financial strain, in spring 2007, the District reduced staff in the Office of Secondary Education and then in fall 2007 eliminated the Office altogether. The staff reductions greatly expanded the work of those who remained, and the focus of the leadership in that office—Mr. Bichner and consultant Dr. Jones—was by necessity on meeting immediate school needs. When the office was dissolved, Bichner and Jones continued to be District staff for the Blueprint planning process.

The stir at the top did not end with the CFO and CEO. Even before the budget crisis there had been rumors that Dr. Gregory Thornton, the District's Chief Academic Officer (CAO), was looking for a new position, and in July 2007, he stepped down. Dr. Thornton, to whom the Office of Secondary Education reported, provided oversight to the District's work on the Blueprint. His departure left another hole in the District's support structure for the initiative.

Even before the turmoil of transition set in, the proposal to the William Penn Foundation had specified that a new district position be created to ensure that the planning process had the full attention of a designated District person. The District, however, did not make this hire until well into the first year of the project—summer 2007. Before departing, Dr. Thornton approved the hiring of Ms. Naomi Housman, who came to Philadelphia from a national high school reform organization. Her hiring became even more important in light of the stresses District staff were feeling as a result of the financial crisis; she was able to relieve some of the pressure over-assigned District staff felt and bring new focus to the planning process.

In August 2007, Dr. Jones was named interim CAO. As CAO, Dr. Jones maintained the Blueprint planning process as a key part of her portfolio of work. By mid fall, the central office shifts and restructuring had somewhat settled and Dr. Jones had designated Mr. Bichner, Ms. Rosalind Chivis, from the Office of Curriculum and Instruction, and Ms. Housman as the District team for the initiative.

Adding to the summer turmoil and uncertainty, in August 2007, Mr. James Nevels stepped down as Chairman of the five-person School Reform Commission (SRC), the District's city/state appointed governing board. The governor quickly moved to name a sitting commissioner, Sandra Dungee Glenn to be the new chairwoman, leaving an open seat on the Commission, to which he named Dr. Heidi Ramirez from Temple University, who was approved in March 2008. Both Dungee-Glenn and Ramirez

had strong reputations for child advocacy and between them substantial ties to community and partner groups. Ramirez, in her role as a liaison between Temple University and the District, had been a regular participant in Blueprint steering committee meetings.

In March 2008, a new CEO, Dr. Arlene Ackerman (who prefers the title Superintendent), was hired with a start date in June. While her appointment resolved the worry about the District's leadership vacuum, it also meant that there was an atmosphere of uncertainty at the District as new staffing assignments were made for some, and other staff departed. To allow Dr. Ackerman time to reorganize, and "put her imprint on it [the planning process]" the presentation of the plan to the SRC was postponed.

As the District struggled in 2006-07, the mayor and city council, with a few exceptions, watched from the sidelines. But with the election of Mr. Michael Nutter as mayor in November 2007, the tone changed. Mr. Nutter called himself an education mayor, and highlighted the important link between the public schools, crime reduction, and increasing the educational attainment of Philadelphians, to the future of the city. In January 2008 he appointed Dr. Lori Shorr, a former employee of the Pennsylvania Department of Education (DOE) and the Philadelphia Youth Network (PYN) (a nonprofit group that partners with the District and that is concerned with out-of-school youth and reducing the dropout rate), to head his education team. Shorr had been involved with the Blueprint planning since its inception, and when she joined Nutter's cabinet it was hoped that political support would be forthcoming.

Despite the turbulent environment in which the Blueprint planning occurred, as planning was winding down there was promise that conditions in the District would change. A new Superintendent was in place, all openings for commissioner of the SRC were filled, the governor was pushing legislation that would begin to remedy fiscal problems, and the new mayor was rallying behind the schools, working to engender a statewide coalition around improved state funding for public education, and trying to convince the business community of the vital link between the schools and the economic future of the city. By fall 2008, the planning process was poised to begin a next phase, including year 1 implementation, pending the approval of a new Superintendent and the SRC, and a settling of staff roles and responsibilities at the District.



RESEARCH FOR *ACTION*

3701 Chestnut Street
Philadelphia, PA 19104
TEL (215) 823-2500
FAX (215) 823-2510
www.researchforaction.org