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ISSUE BRIEF
SCHOOL DISTRICT PORTFOLIO MANAGEMENT

July 2012

Pennsylvania Clearinghouse for Education Research (PACER)



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This PACER Issue Brief examines the implementation of portfolio school management models in school districts throughout the nation.

Other Issue Briefs include:
Educational Vouchers, Teacher Effectiveness, Charter School Authorization and Accountability, and Performance Pay for Teachers.

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INTRODUCTION

A decade ago, Philadelphia represented the nation's largest experiment in external management of public schools. The factors leading to the changes in the early 2000s included a massive budget deficit, followed by an influential private firm's recommendation to dramatically overhaul the district.¹ Philadelphia ultimately contracted the management of dozens of low-performing schools to outside providers, while restructuring a number of other schools under district control.

Today, an even more ambitious effort to restructure the district has been proposed. The draft *Blueprint for Reforming Philadelphia's Public Schools*, released in April 2012, sets two distinct goals: 1) Safe, high-performing schools district-wide; and 2) The elimination of a more than \$200 million budget deficit by 2014.

The plan proposes to address the deficit through renegotiated contracts, increased city funding, and operational efficiencies. The school improvement strategy is multi-faceted: Building professionals are provided more decision-making powers, school choice options are expanded and curriculum is enhanced. Like the district's reforms in the 2000s, the plan also emphasizes significant decentralization of district authority to external managers. But while the reforms a decade ago kept a solid majority of public schools under traditional district management, the current blueprint has the potential to impact every school.

Several aspects of the proposed plan are based on the portfolio management strategy of school governance. Key elements have been embraced by city leaders, including the incoming superintendent. The purpose of this brief is to inform Philadelphia's education community, policymakers, and stakeholders as these discussions move forward. Research for Action consults rigorous research to answer commonly-asked questions, and examines the track record of portfolio management through the efforts of Chicago, New Orleans, and New York City—three districts at the forefront of large-scale restructuring of this kind.



THE PENNSYLVANIA CONTEXT

The proposed restructuring of Philadelphia’s public schools comes at a time of unprecedented financial challenges for the district and for an increasing number of communities statewide. A survey of the state’s school administrators and business officials found that nearly 100 Pennsylvania districts—roughly one in five—expect to experience financial distress within three years if state and local school funding does not increase.²

Meanwhile, a recently-enacted state law holds major implications for the communities in greatest distress, including Philadelphia, as well as Chester-Upland in the east and Duquesne City just outside Pittsburgh. The law includes provisions that mirror key aspects of Philadelphia’s proposed blueprint, including streamlined administrative operations, contracting out school management and non-instructional services, avenues to greatly expand the presence of charter schools through the conversion of existing schools, and prescriptions for school closures.³

Such policies are informed by bipartisan efforts at the national level, where the influential Race to the Top grants rewarded states that implemented expansive school choice and outlined plans to close persistently low-performing schools. With similar financial circumstances in urban districts, and similar prescriptions for addressing low-performing systems, the discussion taking shape in Philadelphia is relevant far beyond the district’s lines.

WHAT TO WATCH FOR

The proposed restructuring plan draws explicitly on the **portfolio management** design of school governance, which emphasizes **market principles, expanded choice**, and a **sparse central management unit** atop diverse, **semi-autonomous networks of schools**. Resources are redirected from under-enrolled or low-achieving schools toward higher-performing or improving schools through the increased use of school choice and closure policies.⁴ Based on RFA’s research on Philadelphia’s prior experience with governance changes and diverse providers, the experiences of other districts, and an examination of the relevant literature, key considerations include:

- ❗ **FUNDING:** In the three largest districts with portfolio management—Chicago, New York City and New Orleans—reforms were implemented alongside an infusion of significant resources. In 2001, Philadelphia and the state provided \$120 million in new funding to support the first diverse provider model; recurring state appropriations over the following decade provided substantial additional support.⁵ In other large urban districts where similar reforms have occurred, philanthropies have played a major ongoing role.⁶ With this in mind, how will acute, near-term fiscal challenges in Philadelphia square with the need for funding to implement the reform efficiently, effectively and equitably?
- ❗ **MANAGEMENT CAPACITY:** While the plan calls for the transfer of some authority to school buildings, the district central office will likely remain responsible for: 1) recruiting and contracting with new school providers; 2) developing and implementing a strong accountability system; 3) managing the closure of poorly performing schools; and 4) replicating stronger school models that are showing results. In light of significantly reduced central office staffing, how will the management and staff build the capacity to ensure educational services for every student, and recruit enough high-quality providers and staff to a district with such a significant financial deficit?

! **ACCOUNTABILITY:** A robust, independent, and empowered accountability system is essential in any decentralization effort. Necessary components include a valid and reliable system of evaluation as the basis for identifying successful and struggling schools; a longitudinal data system and measures of effectiveness that are accessible to the public; and a system of sanctions, rewards, and improvement planning. What will be the provision for assessment and accountability within schools, among school groups, and district-wide?

! **CHOICE AND EQUITY:** A basic tenet of portfolio management is that students and their families will have equal access to high quality schools. This is a significant challenge for a district with a history of poor or mediocre performance in many of its schools, including traditional public and charter schools. Further, research has found that under the current system of high school choice in Philadelphia, fewer than half of students seeking to attend a school outside their neighborhood have been admitted to the school of their choice.⁷ And vulnerable families—those with limited resources, limited English proficiency, and special needs children—have particular difficulty negotiating choice systems. Given this, how will the district provide students and families with equitable school choice and selection?

! **POLITICS:** Any major reform effort in Philadelphia must confront significant political considerations and powerful stakeholder groups, including elected officials, unions, and the media. The challenges associated with closing schools, renegotiating or terminating contracts, and involving a host of new providers will be significant. What are the district's plans for addressing these challenges?

SCHOOL DISTRICT PORTFOLIO MANAGEMENT: FREQUENTLY ASKED QUESTIONS

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What is portfolio management?

Portfolio management seeks to improve student outcomes in low-performing schools by addressing the structure of school governance:

- **Central offices** move from directly managing schools to a focus on the closure and creation of schools based on performance;⁸
- **Management of schools** is based on contract arrangements;⁹ and
- **School building principals** are provided increased authority over budget and program decisions.¹⁰

Portfolio models emphasize strong accountability systems and school choice. The Center for Reinventing Public Education (CRPE), a consistent advocate for the model, summarizes the design's intention: "A portfolio district is built for continuous improvement via expansion and imitation of the highest-performing schools, closure and replacement of the lowest-performing schools, and constant search for new ideas."¹¹

It is important to note that evidence of the model's impact on students and schools is limited,¹² with just a handful of rigorous studies examining the effects of portfolio reforms on student achievement. For a summary of RFA's research on elements related to portfolio management, see *Lessons Learned* on page 8.

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Where are portfolio-type models in place? What factors motivated the restructurings?

Portfolio management is a growing trend in urban school reform. Hill and Campbell (2011) of CRPE state that the number of districts incorporating aspects of portfolio management has grown from four in 2008 to 24 in 2011.¹³ Portfolio-type programs are in place to varying extents in several of the nation's largest school districts, including Chicago, Los Angeles, New York

City, and Washington, D.C. In 2008, Prince George’s County, the current assignment for Philadelphia’s incoming superintendent, attracted outside investments from major national foundations to implement portfolio-type changes.¹⁴

Two factors contributing to the model’s expansion across multiple districts include:

- **Federal initiatives** under both Democratic and Republican administrations promoting school turnaround and choice; and,
- **Local political shifts**, such as mayoral takeovers in both New York and Washington.¹⁵

The reform’s evolution is most often gradual, with city and school leaders building upon efforts of prior administrations or drawing on the experience of peers in other cities.¹⁶ However, following Hurricane Katrina, the emergence of the portfolio model in New Orleans was dramatic and fast-moving.



For Philadelphia, how would the current portfolio management proposal differ from earlier re-configurations of schools?

A decade ago, Philadelphia contracted out the management of 46 low-performing schools to seven for-profit and non-profit organizations, and concurrently restructured another 21 schools. The district described its approach within the diverse provider model as “thin management,” where the central office maintained responsibility over key non-instructional functions.¹⁷ The Renaissance Initiative, beginning in 2010, represented a smaller experiment. Seven low-performing schools were matched with charter managers and six schools were restructured under district management; 10 additional Renaissance Charter Schools were added during the 2011-12 school year.¹⁸

If implemented as currently drafted, the new proposal moves Philadelphia closer to a comprehensive portfolio system. The plan substantially reduces the capacity of the district office; focuses the central administration’s attention on the closing and opening of schools based on performance; provides greater autonomy to principals (especially in high-performing buildings); and offers greater choice for students and families.¹⁹

LESSONS LEARNED: RESULTS FROM RIGOROUS RESEARCH ON ELEMENTS OF PORTFOLIO REFORMS IN PHILADELPHIA

A four-year mixed methods analysis of the district’s 2001-2006 diverse provider reform found:

- “No statistically significant effects, positive or negative, in reading or math” among **privately-managed** schools (p. xiii).²⁰
- Schools exposed to a **district-led** intervention (restructured schools) posted “significantly positive effects” for reading in the first year of the initiative and especially durable gains in math that lasted even beyond the lifespan of the initiative.

A more recent study, examining Year I of the Renaissance Schools Initiative—which focused additional resources and support on 14 schools in 2010-11—showed:

- Both district-led Promise Academies and charter-managed Renaissance Schools outperformed comparison schools.
- There was no significant difference between Promise Academies and Renaissance Schools in academic and attendance improvements.²¹



How are portfolio models organized?

Nationwide, there is no single portfolio model. The design, implementation, and types of providers vary by district. For example, about one-fifth of Chicago’s public schools currently fall under its portfolio system, while New York City’s portfolio model reaches the great majority of traditional public schools. The following table provides a basic overview of portfolio-type models in Chicago, New Orleans, and New York.

School District: Chicago ²²
Footprint of Portfolio (Partial or District-wide): Partial
Type of School under Portfolio: Charter - 82
District - 35
Independent - 9
Oversight Authority: Office of New Schools; Chicago Public Schools
Additional Financial Resources During Transition: <input checked="" type="checkbox"/>
<hr/>
School District: New Orleans (Recovery School District) ²³
Footprint of Portfolio (Partial or District-wide): District-wide
Type of School under Portfolio: Charter - 50
District - 16
Oversight Authority: State Board of Elementary and Secondary Education
Additional Financial Resources During Transition: <input checked="" type="checkbox"/>
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School District: New York City ²⁴
Footprint of Portfolio (Partial or District-wide): District-wide
Type of School under Portfolio: Charter - 129
District - 1,500+
Oversight Authority: New York City Department of Education
Additional Financial Resources During Transition: <input checked="" type="checkbox"/>



How is accountability for performance managed in portfolio systems?

Accountability mechanisms—the factors leading to rewards and interventions—share several broad characteristics, with important local variations. For example:

- Louisiana places its poor-performing schools under the purview of the Recovery School District, a state-run entity that expanded dramatically after Hurricane Katrina.²⁵
- Recent Chicago school policy granted principals of high-performing or improving public schools more authority over budgetary decisions, curriculum and assessment, scheduling, and professional development*—a design similar to Philadelphia’s plan for the 2012-13 school year.
- Charter school evaluations and renewal decisions in Chicago, New Orleans, and New York are based on multi-year performance agreements, not annual accountability schedules.^{26,27,28}

A snapshot of key components of the annual accountability process for high schools in Chicago,²⁹ New Orleans³⁰ and New York³¹ follows:

School Performance rating components:		
	Assessment	Other Measures
	(student performance)	(e.g., graduation rates)
Chicago	50%	50%
New Orleans	70%	30%
NYC	25%**	75%

* A 2009 review of a subset of these schools, focused on the high school level, could not determine whether the policy had any impact on student growth. Source: Sartain, L., McGhee, Jr., R., Cassidy, L., Abasi, M. I., Young, V. M., Spote, S. E. & Shields, P. M. (2009). High school reform in Chicago Public Schools: Autonomous Management and Performance Schools. SRI International. Retrieved from http://policyweb.sri.com/cep/publications/AMPS_final.pdf

Intervention decisions based on:

Chicago	School performance against assigned targets (e.g., dropout rates, standardized tests, attendance)
New Orleans	School performance against assigned targets (e.g., standardized tests, cohort graduation index) ³²
NYC	School performance compared to similar, “peer” schools

For lowest performing schools, closures or conversion could begin:

Chicago	After 1 year of unsatisfactory progress
New Orleans	After 4 years of unsatisfactory progress
NYC	After 1 year of unsatisfactory progress

Closure decision made by:

Chicago	Mayoral-appointed school board
New Orleans	State Superintendent of Education, with oversight from State Board
NYC	Mayoral-appointed Chancellor, with oversight by the Panel for Education Policy

** For New York City, we use the city’s definition of “Student Progress”—which includes course-taking and performance—in the “other measures” count.



How do school closures—a key element in portfolio models—influence achievement?

Philadelphia’s proposed restructuring emphasizes the closure of schools deemed unsafe, low-performing, and under-enrolled. Closure has been central to portfolio strategies in other cities as well, including New York and Chicago:

New York:

Number of schools closed: 140 between 2002 and 2012

Findings

- Schools that closed had greater concentrations of high-need, low-income, and transient students.³³
- Newly constituted schools had higher graduation rates.³⁴
- In the years leading up to a school closure, there was an increase in high-needs students.³⁵

Chicago:

Number of schools closed: 44 between 2001 and 2009

Findings

- Most of the students transferred into schools that were academically weak.
- Student achievement was not significantly different from expected outcomes had students remained in their former schools.
- The largest negative impact on students’ reading and math scores occurred in the year before their schools were closed.³⁶
- A study that examined data from six districts found that negative impacts on student achievement associated with school closure were minimal and temporary.³⁷

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How do school closures impact costs?

A 2011 Pew Charitable Trusts report found that the annual savings per school building closure in six cities nationwide averaged less than \$1 million. Pittsburgh—which shuttered 22 schools in 2006 and reduced its workforce by nearly 280 staff members—experienced an annual operational savings of approximately \$14.7 million.³⁸

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How are school choice systems structured within portfolio management districts?

There is substantial variation in the design of choice systems—the policies that determine how students select schools and how placement is determined. For example, New York City’s system requires 8th graders to select as many as 12 public high schools they wish to attend. A computer program then matches nearly every student to at least one of his or her chosen schools.³⁹ Decisions on admissions vary: some schools are selective, requiring tests or auditions, or give priority to students in a particular geographic zone; others are “unscreened,” where students who apply are selected randomly.⁴⁰ In 2008, around half of the NYC 8th graders were placed in their first choice and 80 percent of students gained admission in one of their top three choices.⁴¹

Research on Philadelphia’s current high school choice process reveals considerable limitations.⁴² In 2006 and 2007, nearly three quarters of Philadelphia’s 8th graders applied to public high schools outside of their neighborhoods, but half of these students were accepted by their chosen site.⁴³ In the restructuring plan, procedures for student selection and transfers were not delineated.⁴⁴



How do choice systems address equity of placement?

The extent to which specific requirements and efforts address equity varies across districts employing choice systems. For example:

- In Chicago’s selected enrollment high schools (the district’s most academically advanced schools), district policy requires administrators to “make a good faith effort” to ensure that the enrollment rate of students with disabilities is within five percent of the citywide rate.⁴⁵ The city’s charter schools enroll students with disabilities at nearly the same rate as district schools but serve significantly fewer students with the most severe disabilities⁴⁶—a pattern that exists nationwide.
- For New Orleans, Louisiana policy requires charter schools to maintain an “at-risk” student population that is equal to the percentage of students in the district eligible for free or reduced price lunch, with 85 percent of this subset pulled from low-income households.⁴⁷

CONCLUSION

Earlier this year, the district’s Chief Recovery Officer argued that Philadelphia faces a “unique moment”—that “years of slow economic growth have cut [Philadelphia’s] resources significantly, even as [it’s] expenses have continued to rise. We are, quite simply, in a financial crisis.”⁴⁸

This reality, along with growing impatience with the pace of school improvement and student achievement, represents an almost unprecedented set of pressures for the school district, its faculty and staff, and the children and families they serve. Proposals to restructure the district—in ways more sweeping than even the dramatic and contentious reforms from the last decade—undoubtedly represent additional challenges. Indeed, researchers from CRPE concede that “rebuilding a school district on the portfolio model involves challenges of many kinds—technical, organizational, and political” (p. 34).⁴⁹ How Philadelphia confronts these challenges will hinge on the district’s capacity to manage change at a time of significantly diminished resources.

Districts that have implemented broad-scale portfolio plans did not face the economic headwinds currently buffeting Philadelphia. Louisiana’s Recovery School District, for example, spends substantially more than New Orleans Public Schools prior to Hurricane Katrina.⁵⁰ Spending on Chicago Public Schools increased 33 percent from 2002 through 2009. And in New York City, local spending has doubled since 2002;⁵¹ overall, state and city contributions have increased more than \$3 billion in the last five years.

In addition to questions regarding resources, considerations of management capacity, accountability for performance, and student choice and equity in these policies will be central in the coming months. The discussions ahead should answer these questions as specifically as possible.



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Research for Action
3701 Chestnut Street
Philadelphia, PA 19104
Tel. 215.823.2500
Fax 215.823.2510
info@researchforaction.org
www.researchforaction.org