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The Campaign for Human Capital at the School District of Philadelphia

Tomás Hanna, special assistant to the CEO for retention and recruitment, returned to his desk after a full day of school visits. He needed to take a break from the hectic pace of implementing the recommendations from the Campaign for Human Capital (the Campaign).

The Campaign, initially called the “Teacher Recruitment and Retention Task Force,” began in November 2002 to address the critical problem of teacher shortages in the School District of Philadelphia (the District). The Campaign was nearing its first full year of implementation and by the start of SY04 had met several of its objectives.¹ Numerous vacancies had been filled, and teacher retention had increased from 75% in SY03 to 95% in SY04 across the 276 schools in the District. While these results exceeded Hanna’s expectations, he remained concerned about maintaining the Campaign’s momentum and fully integrating its recommendations into District operations. Furthermore, contract negotiations between the District and the Philadelphia Federation of Teachers (PFT) were scheduled for August 2004. Hanna was curious to see how the District and the PFT would resolve the issue of site-based selection, a key recommendation arising from the Campaign that would move the District from a more centralized hiring process to a decentralized school-based system.

Background

Serving 214,350 students in SY04, the School District of Philadelphia was the eighth-largest school district in the United States and the largest in Pennsylvania. The District employed over 11,000 teachers and operated 276 schools (see **Exhibit 1** for district facts and figures). Throughout the 1990s, the District experienced significant financial troubles. In addition, it had posted disappointing results on the Pennsylvania System of School Assessment (PSSA), a statewide examination instituted in 1996. This set of criterion-referenced tests was administered to students in grades 5, 8, and 11 in reading and math and grades 6, 9, and 11 in writing. From 1996 to 2002, students from the District showed

¹ PELP cases use the convention “SY” to designate, in this instance, school year 2003–2004.

Professor David Thomas and Research Associate Modupe Akinola prepared this case. PELP cases are developed solely as the basis for class discussion. Cases are not intended to serve as endorsements, sources of primary data, or illustrations of effective or ineffective management.

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slight gains on the PSSA, but these gains paled in comparison to low absolute scores (see **Exhibit 2** for selected PSSA data).

A History²

David Hornbeck From 1994 through 2000, Superintendent David Hornbeck, former state superintendent of schools in Maryland, led the District. Under Hornbeck's leadership, the District embarked upon an ambitious 10-point plan, entitled "Children Achieving," in an effort to improve student performance. The plan emphasized that all children could achieve at high levels and focused on increasing standards and accountability. In addition, Hornbeck decentralized the District and restructured it into 22 clusters, each headed by a cluster leader.

Hornbeck's reform efforts won him initial support from the business community, parents, teachers, and the mayor. However, the changes required by Children Achieving necessitated substantial funding, resulting in protracted financial disputes between the District and the state. These disputes escalated in 1998 when Hornbeck threatened to submit an unbalanced budget. Legislators countered by passing Act 46, a law authorizing a state takeover if the District fell into financial or academic distress. In 2000, the newly elected mayor of Philadelphia, John D. Street, convinced then-Governor Tom Ridge to allocate an additional \$45 million to the District to avoid the state takeover. Unhappy with these terms, Hornbeck resigned in July 2000, having implemented very few of the goals and action plans established in Children Achieving.

Philip Goldsmith Following Hornbeck's resignation, the Pennsylvania Department of Education declared the District an "Empowerment District," since a combined average of 50% or more of students had scored in the bottom quartile of the PSSA over two consecutive academic years. Shortly thereafter, Mayor Street appointed Philip Goldsmith, a successful businessman, as interim CEO of the District. Goldsmith reversed some of the structural changes instituted under Children Achieving in an effort to reduce District expenses. However, by summer 2001, the District still faced an operating deficit of \$200 million.

In August 2001, Governor Ridge awarded a \$2.7 million no-bid consulting contract to Edison Schools, a for-profit educational management organization, to evaluate the District and recommend improvements should the governor implement a state takeover. In November 2001, Edison revealed its findings, which included a suggestion that the state hire Edison to run 45 low-performing schools and manage the District's central administration. Under this proposal, Edison employees would hold senior leadership positions and would not be accountable to the District's board of education. Livid at the prospect of relinquishing control of the District to Edison Schools, Goldsmith resigned from the superintendency on December 14, 2001.

State Takeover and the School Reform Commission

On December 21, 2001, Governor Schweiker and Mayor Street developed a partnership between the city and the state in which the District was transferred officially to state control. The agreement established a five-member School Reform Commission (SRC) charged with turning around the District (see **Exhibit 3** for SRC powers). Under Act 46, the governor would appoint three SRC members, while the mayor would appoint two. The SRC was chartered as an independent body with

² See "Finding a CEO for the School District of Philadelphia: Searching for a Savior?" HBS Case No. 803-072 (Boston: Harvard Business School Publishing, 2003) for additional background on the School District of Philadelphia.

fiduciary responsibility to the state and was required to submit occasional reports to the city and state.

SRC Priorities

The five SRC members immediately set out to tackle three key problem areas: the \$200 million operating deficit, school safety, and the ongoing privatization debate. The SRC also began a search for a new CEO for the District.

To address privatization, in April 2002 the SRC voted 3–2 to award contracts to seven private companies, nonprofits, universities, and community groups to run 45 of the city’s worst schools. The commission also authorized 48 schools to be converted to charter or independent status or to be reconstituted, freeing them from the many union contract regulations. Under the contract between the District and the PFT, seniority and teacher preference were the key criteria for assigning educators to school buildings (see **Exhibit 4** for PFT contract). Thus, the SRC’s actions opened the door for reexamining seniority stipulations, a contentious issue in the existing union contract, which was due to expire on August 31, 2004.

The Appointment of Paul Vallas

Commissioners Sandra Dungee Glenn and Jim Gallagher began coordinating an extensive search effort for a new CEO. In March 2002, the SRC selected Heidrick & Struggles, a leading international executive search firm, to manage the CEO search with the goal of having the new CEO in place by the start of SY03. By May 2002, Heidrick & Struggles, in conjunction with the SRC, had narrowed 15 candidates down to three finalists. In July 2002, Paul Vallas, the CEO of Chicago Public Schools from 1995 to 2001, accepted the position of CEO of the School District of Philadelphia.

Reforms under Paul Vallas

Upon taking the helm, Vallas set out to turn around the District. More than 170 of the schools in the District had been classified as failing, and nearly half of entering ninth graders never received high school diplomas. Vallas’s reform efforts were aimed at improving the financial health of the District, providing more support for all students, creating safer and more modernized schools, unifying the curriculum, and strengthening professional development for all District staff. In December 2002, Vallas and his team published a strategic plan for the District entitled “Students Succeeding 2002–2008” that outlined each of his key reforms (see **Exhibit 5** for a summary of Students Succeeding).

Improving the District’s financial health Vallas focused on creating a balanced budget for SY03. Vallas aggressively cut costs by eliminating redundancies in the facilities program (\$4.2 million), better managing the comprehensive daycare program (\$2.4 million), and reducing all nonschool-based, nonpersonnel budgets by 5% (\$2.5 million). In addition, Vallas positioned the District to achieve its programmatic goals while operating with 1,048 fewer staff members than it had in the year prior. Vallas then worked with his team to create a five-year balanced budget. “I always budget in five-year cycles,” noted Vallas. “My balanced budgets are never finalized until I can guarantee that five years from now, the budget will also be balanced.”

Providing support for all students One of Vallas’s first actions was to set a reduction in class size as a budgetary goal for the District. On average, student-teacher ratios had hovered in the

range of 30:1 to 33:1 depending on the grade level. Vallas's goal was to achieve a target student-teacher ratio of 22:1. In addition, Vallas and his team expanded the Literacy Intern Program, a program in which college graduates specially trained in early literacy supplemented classroom instruction by providing one-on-one support and small-group instruction for students. The District introduced after-school programs to provide additional learning opportunities for students and established Saturday programs and ancillary services to accommodate parental working schedules. The District also expanded the number of schools open during the summer for summer programs, increased offerings of popular advanced placement (AP) and honors classes, and scheduled more time in the school day for math and reading.

Capital improvements and school safety With a large number of schools in disrepair, Vallas earmarked \$1.5 billion over five years to build "twenty-first century schools" and modernize existing buildings. Along with making capital improvements, the District began to implement strategies to improve school safety by involving parents to help halt truancy and instituting disciplinary alternatives for students with behavioral problems. Examples included mandatory Saturday classes for students suspended at least twice and a transitional program for students returning from incarceration or detention that provided training in life skills and conflict resolution to help students "make better choices in the future."

Unifying the curriculum Toward the end of SY03, Vallas established a new Office of Curriculum, Instruction, and Professional Development (CIPD), which was responsible for identifying and implementing exemplary curriculum and instructional practices. Vallas staffed the office from scratch with individuals from within the District, recruited curriculum consultants from around the country to advise the team, and earmarked specific funds for this office. "Just as corporations invest in research and development, we need to invest in curriculum, instruction, and professional development," he noted. In addition, Vallas began to standardize the curriculum across the District and invested \$18.7 million in new books and materials for SY04. This move was critical since, according to SRC chairman Jim Nevels, "ensuring that all of our children are learning at grade level is the central pillar of public education reform in Philadelphia."³ Vallas and the SRC wanted to ensure that "all students throughout the system are being taught to state standards at the same time" and that "no student will be lost because of transfer, for whatever reason, to another school that may be using different materials."⁴

Vallas and his team also worked to incorporate topics such as civics, values, and family health into the curriculum. Community service was required for students at specific grade levels, and partnerships with key organizations such as the Red Cross had been established within schools in an effort to expand and supplement educational programs.

Strengthening professional development In order to make sure that the new curriculum was being delivered effectively in the classroom, Vallas began to focus on professional development within the District. Vallas noted, "If you are constantly refining and updating your curriculum, then you need to constantly assure that high-quality professional development is being instituted."

Vallas's interest in improving professional development stemmed from the theory that the District's success in enabling all students to achieve at high levels relied on "the capacity of everyone at every layer of the organization to adopt, develop, and implement practices that will improve

³ Amy Guerin, "School District of Philadelphia Distributes First Standardized Curriculum," The School District of Philadelphia Web site, www.phila.k12.pa.us, accessed June 18, 2004.

⁴ Ibid.

student achievement.”⁵ Vallas’s ultimate goal was to deepen teachers’ knowledge base and retrain the entire District in the implementation of “exemplary instructional models.”

To address this issue, Vallas instituted year-round mandatory professional development for teachers. He observed:

Teachers are provided with a full week of professional development before the school year begins. During the school year, schools are dismissed for half a day twice per month so that teachers can receive professional development. In addition, the District provides paid professional development for teachers on Saturdays and throughout the summer. All told, teachers receive over 100 hours of mandatory professional development per year.

Principals and District staff were also given opportunities to engage in professional development activities in an effort to strengthen their expertise.

The Teacher Recruitment and Retention Task Force

Vallas’s reforms required a steady stream of new teachers entering the District annually. Vallas explained, “The District’s entire academic program from the new curriculum to raising standardized test performance, from reduced class size to Extended Day hinges on having highly qualified and highly motivated teachers in every classroom.”⁶ Vallas was concerned with the shortage of teachers in the District and the numerous vacancies at the start of each academic year stemming from poor retention. To tackle this problem and address the need for high-quality teachers, in July 2002 Vallas selected Hanna, then principal of Kensington High School, to become his special assistant for teacher recruitment and retention. Vallas recalled:

One of the first things I did was recruit Tomás Hanna because I wanted somebody to be in a senior level position who had exclusive administrative responsibility over teacher recruitment and retention. I wanted somebody who was young enough and ambitious enough to know that this would be a career maker or breaker. I needed someone who could bring in energy and innovation, but also somebody who was young enough to relate to and be appealing to the new teachers coming in, but yet somebody who had enough experience so that he would be respected by the educators. Tomás fit this profile.

Vallas deliberately chose to keep the task force separate from human resources, which, according to Chief of Staff Natalye Paquin, reflected his preference to launch his key initiatives using a project management approach. “Paul’s approach of using project managers allows him to delve deeply into problem areas. Paul believes certain issues are so important that if you don’t go deep, you will not be successful in the long run,” noted Paquin.

Tomás Hanna

Hailing from the Fairmount section of Philadelphia, Hanna had been raised in a household of educators. “In 1974, when I was nine years old, my mother became the first Latina principal in the state of Pennsylvania. She was appointed to the principalship of the Waring School, which was, at

⁵ “Students Succeeding 2002–2008,” School District of Philadelphia, February 2002, p. 50.

⁶ Amy Guerin, “Watershed Recruitment Effort Helps Philadelphia School District Exceed New Teacher Recruitment Goals,” The School District of Philadelphia Web site, www.phila.k12.pa.us, accessed June 18, 2004.

that time, in a predominantly Latino community,” noted Hanna. Hanna had spent his elementary school years in private and parochial schools in Philadelphia and in Puerto Rico. However, in the sixth grade, he quickly seized the opportunity to attend Germantown Friends School (GFS), a private day school in the Germantown neighborhood of Philadelphia. “GFS was a revelation to me and had an impact on the way I view public education. My experience at GFS made me wonder, why can’t everyone have this opportunity?” Hanna recalled. After graduating from GFS, Hanna enrolled at the University of Puerto Rico, where he received a degree in secondary English education.

Following graduation from the University of Puerto Rico, Hanna moved back to Philadelphia where he assumed a number of roles in the District, including teaching and ESOL supervision. In June 1996, Hanna assumed his first principal position, at Sheppard Elementary, followed by his second principalship, at Willard Elementary School. In June 2001, Hanna became principal at Kensington Senior High School, one of the District’s struggling high schools. While at Kensington, Hanna made a series of dramatic improvements. In the 14 months of his leadership, PSSA scores rose significantly. On average, PSSA math scores for students in the 11th grade, the only high school grade tested on the PSSA, rose 50 points, while average reading scores for students in this same grade rose 60 points. Hanna was determined to make significant changes at Kensington, particularly in the areas of improving school climate, test scores, and low graduation rates.

In July 2002, Vallas’s secretary invited Hanna to a screening interview with the Vallas transition team for a new position in the District. Following the interview, Hanna received a call from Vallas in which they discussed the role of principals in retaining qualified teachers. Hanna recalled this conversation:

Paul asked me to talk a little bit about what I was doing at Kensington. I gave him an example that had to do with teacher recruitment and retention. I told him, “If you want to talk about merit pay, pay me for holding onto my teachers. It doesn’t matter how many new schools you build. It doesn’t matter what books you have. If in that building you don’t have a qualified teacher and a strong principal to lead it, you’re going to have a brand new empty building.” And at that point, Paul said, “I want you to come in on Tuesday.” I met with him that following Tuesday and it was done. “You’re going to do teacher recruitment and retention,” he told me. And I asked a really, really stupid question. I asked him, “What do you want me to do?” And he answered, “You’re the smart guy. You do it and *you* tell *me* what we’re going to do.”

Despite his initial hesitance about leaving Kensington, which had experienced significant principal turnover in the past, Hanna accepted the position of special assistant to the CEO for recruitment and retention and began reporting directly to Vallas in July 2002. “Paul is an enabler,” noted Hanna. “He gave me a canvas and said ‘go do your thing.’”

Launching the Task Force

Hanna knew that in order to develop an effective teacher recruitment and retention plan for the District, he would need to create a task force with high-powered individuals in the community as members. Hanna’s ultimate goal was for the task force to produce a report for the District with recommendations as to how the District could improve teacher recruitment and retention. Hanna wanted this report to serve as a blueprint—a detailed action plan—that District staff could use in implementing key recruitment and retention initiatives.

Assembling the Team

Hanna first approached Rosemarie Greco, former president of CoreStates Bank and director of the office of health-care reform for the state of Pennsylvania, to cochair the task force. Hanna also approached Sandra Dungee Glenn, a mayoral appointee to the SRC and president of American Cities Foundation, to be cochair with Greco. In addition, Hanna selected Deb Weiner, director of school projects at Philadelphia Futures, a nonprofit aimed at preparing high school students for college, and hired a confidential secretary, Zoraida “Zee” Olmo, and a special projects assistant, Arasi Swamickannu, to staff the Office of Recruitment and Retention. This group of six individuals began to refer to themselves as the “work team.”

Work team objectives The main objective of the work team was to assemble a core group of individuals who would be responsible for developing recommendations around the District’s recruitment and retention efforts. Both Greco and Dungee Glenn scoured their rolodexes to identify individuals to serve on the task force. Greco recalled this experience:

Tomás came to me with this idea in its embryonic stage. I told Tomás that to make this work, we would really need to bring in best practices from the private sector. With my contacts and with Sandra’s contacts, we were able to bring to the table very significant and recognized talent from throughout the region who were either involved in human resources management or the leadership of a company. We then began outlining what we wanted these individuals to do.

Greco, Dungee Glenn, and Hanna began to assemble this talent from the Philadelphia region and from within the District. Concurrently, Weiner, with her expertise in community advocacy and planning, focused on developing a mission statement and setting goals for the task force.

The work team was well aware that members of both the PFT and the Commonwealth Association for School Administrators (CASA), the local union representing administrators, would need to be a part of the task force, as its recommendations would inevitably impact the constituents of both unions. University partners would also need to be included in the task force given that local colleges and universities were a key source of teachers for the District. Hanna and the work team also carefully selected individuals from the District who would be critical to implementing task-force recommendations.

In order to fully capitalize on best practices from the private sector, the work team decided to tap into corporations with a strong history with the District, in addition to a few new corporations. These corporate partners would be instrumental in not only helping to “bring an outside perspective” but also in providing funding for potential initiatives. In addition, the work team invited a variety of nonprofit organizations and representatives from the Philadelphia Department of Education to be involved in the task force. These members could serve as community advocates and provide the District with valuable insights on the needs of their respective constituents.

By November 2002, the work team had recruited 28 individuals to be members of the task force.

Renaming the task force One pivotal moment in the planning process occurred during a meeting between Hanna, Dungee Glenn, Greco, and Weiner in September 2002. Hanna reflected on this meeting:

We wanted to change our name. The thing with task forces is that there is too much task and not enough force. It was election time, so the idea of a campaign was fresh in our minds. Sandra has a political background, so she wanted to use the word “campaign” because at the

end of a campaign, a winner emerges. Rosemarie thought it was important that we stop looking at the workforce as interchangeable, so she wanted to use the words “human capital.” That is how we came up with the name “Campaign for Human Capital.”

Structuring the Campaign

The work team along with the 28 individuals selected to participate in the Campaign began to meet monthly to discuss key issues pertaining to teacher recruitment and retention in the District. After several brainstorming sessions and e-mail exchanges, they decided to recruit additional people to “drill deeply into the five issues that really mattered.” These five issues were 1) alternative routes to certification, 2) cultural transformation, 3) financial incentives, 4) infrastructure, and 5) recruitment.

The original 28 members became the Campaign “steering committee,” and 67 additional individuals were recruited to be members of five issues committees (see **Exhibit 6** for campaign members).

Steering committee The steering committee served as an advisory council and was responsible for synthesizing all of the recommendations from the issues committees and integrating them into the final blueprint report.

Issues committees The five issues committees were responsible for developing detailed recommendations for improving teacher quality. Each topic area was cochaired by an internal District administrator and an external stakeholder and was given a goal and a list of key tasks to accomplish over three months. These goals reflected the central vision of the Campaign, which was to position the District as “the employer of choice for prospective and experienced teachers”⁷ (see **Exhibit 7** for sample goals and tasks).

On November 19, 2002, a kickoff meeting for all steering committee and issues committee members was held to launch the Campaign for Human Capital at which the objectives of the Campaign and the deliverables for each committee were articulated.

Getting the Job Done

Over three months, each of the issues committees met to complete the tasks given to them by the work team and provide recommendations. Committees would typically convene twice per month for two- to three-hour meetings. Graduate students from the University of Pennsylvania were hired as scribes, allowing committee members to brainstorm freely during these meetings. Committee cochairs were encouraged by Hanna and his team to solicit input from all team members. One committee member commented:

We were very effective at doing our work because there were a number of voices from different areas. We had corporate people, we had union people, we had school administrators, we had teachers, and everybody got the chance to voice his or her concerns. Some were more familiar with the inner workings of the District, and so I think the outside corporate people brought in a whole different perspective. They taught us a little, and we also taught them.

⁷ “The Three R’s Retention, Recruitment, and Renewal: A Blueprint for Action,” School District of Philadelphia, February 2003, p. 1.

Another committee member noted the dedication of each individual involved in the Campaign. “Many committee members were teachers and administrators,” she observed. “This meant taking time off and coming to meetings at night after a long day of school. Everyone did this out of the kindness of their hearts.”

The Blueprint

In February 2003, a report entitled “The Three R’s Retention, Recruitment, and Renewal: A Blueprint for Action” (the Blueprint) was published by Hanna and his team. The report was based on findings from each of the five issues committees, although some committees reported back that certain issues were not of immediate concern. The report highlighted the most important recommendations, which clustered around five broad themes: 1) defining teacher competencies, 2) marketing the District’s competitive advantages, 3) collaborating strategically with external stakeholders, 4) enhancing the professional environment, and 5) maximizing communication and engagement with teachers (see **Exhibit 8** for a summary of Blueprint recommendations). Recommendations were presented to the public in a press conference led by Vallas on February 24, 2003.

Defining Teacher Competencies

The main objective of the teacher competency recommendation was to increase the number of newly hired certified teachers by 50% over SY03. Reaching this goal entailed defining the characteristics critical to successful urban teaching. To identify these characteristics, Campaign members had conducted a teacher survey in January 2003 to determine teachers’ interests, needs, and perspectives on their roles (see **Exhibit 9** for survey questions and responses). Swamickannu commented on this process:

We wanted to do a baseline survey of teachers—kind of like a teacher satisfaction survey, because all these recommendations were coming out of the Campaign, and at one of our meetings one of the Campaign members said, “You know we have all these great ideas . . . why don’t we ask them?” So we decided that we were going to do a baseline survey of teachers. We ended up getting a 72% response rate out of 11,800 teachers.

In addition, Campaign members analyzed new teacher-retention data which revealed that teachers who typically stayed in the District came from only a small number of colleges in the Philadelphia area. This finding resulted in the recommendation that the District streamline its recruiting practices and pinpoint 20 regional educational institutions historically producing the most successful teachers with longevity in the District. Furthermore, Campaign members recommended recruiting at urban historically black colleges and universities with teacher education programs to increase teacher diversity within the District and instituting a tracking process by which teacher performance was monitored.

Marketing the District’s Competitive Advantages

For decades, the District had a negative image as a result of its size and urban population. One new teacher noted, “The district’s reputation was pretty bad, actually. Even people I’d speak to on the street, when they’d find out I was teaching, they’d say, oh, why are you teaching here? It’s terrible, you’re going to be so unhappy, and it’s disorganized, and there’s a lot of laziness, it’s corrupt.” In order to market the District as a good place for teachers, Campaign members

recommended embarking upon an aggressive print, electronic, and in-person marketing campaign. David W. Brown, Campaign committee member and principal at Brown Partners, a multicultural communications agency, commented on the need for a new positioning:

We felt that the District was not going after its target market in an effective manner. The way they were positioning the school district was very old. As a matter of fact, about 10 years earlier I was with an ad agency that created the “Live, Learn and Teach in Philadelphia” campaign. To come back 10 years later and see that they’re using the same slogan and materials made me realize they were missing the point. The target audience had moved.

In addition, Campaign members conceptualized a “get to know you” weekend later named “Rolling out the Red Carpet” in which sophomores, juniors, and seniors from targeted teacher education institutions would receive the opportunity to visit the District and tour Philadelphia.

Although the District boasted a superior benefits package for teachers and provided bonuses and rental subsidies for newly hired teachers, the teacher survey had revealed that teachers still desired higher salaries, tuition reimbursement, and larger signing bonuses. Thus, Campaign members also recommended that in preparation for the next PFT contract, the District should have a goal of a salary scale at the 50th percentile of districts in the surrounding four counties. Campaign members also recommended that the District immediately institute a \$1,000 annual reimbursement per teacher for certification/recertification courses at approved colleges and universities.

Collaborating Strategically with External Stakeholders

Leveraging the belief that “education is a community responsibility,” Campaign members recommended that the District develop stronger relationships and collaborations with teacher education institutions and civic, corporate, and cultural organizations.⁸ The goal behind strengthening relationships with teacher education institutions was to expand the pool of teachers by encouraging local institutions to form partnerships with the District. Relationships with civic and corporate organizations would further strengthen ties between the District and teachers by providing access to activities such as training opportunities for teachers in related fields, internships for teacher development, and funding for critical events such as teacher-recognition days.

Enhancing the Professional Environment

The January 2003 teacher survey highlighted that teachers believed the key drivers of teacher success to be the principal, mentor teachers, and community coordinators. The survey also indicated that key impediments to teacher success were the principal, student behavior, and a lack of administrative support. Furthermore, teachers were concerned about large class sizes and undertaking administrative duties that hampered their effectiveness in the classroom. Already under way in the District was an effort to reduce class size; however, Campaign members recommended several additional ways to enhance the professional environment of the District for teachers.

Principal leadership development To address the issue of principal leadership, Campaign members recommended that the District implement a new leadership development program, which would be designed over the following three months.

⁸ “The Three R’s Retention, Recruitment, and Renewal: A Blueprint for Action,” p. 13.

New-teacher support In an effort to strengthen the support received by new teachers in the District, Campaign members recommended that all new teachers receive a new-teacher coach from the school or regional office. The new-teacher coach program would supplement the existing “Colleague Mentor Program,” a program outlined in the PFT contract in which new teachers received a mentor from their school. The need for the new-teacher coach system was driven by the fact that the existing colleague mentor program did not have coaches exclusively devoted to new teachers. School-based colleague mentors typically had their own teaching commitments and obligations. Campaign members recommended a caseload of 10 new teachers to each new-teacher coach and also suggested professional development in the form of expanded mandatory preservice training and continuing in-service training provided at the regional level for new teachers. Additionally, Campaign members recommended that an Office of Alternative Certification be created within human resources to support all teachers in the system who had not completed certification requirements.

Site-based selection One of the more radical recommendations emerging from Campaign members was related to site-based selection. Under the PFT contract, new teachers could be hired only after vacancies had first been filled by more senior teachers within the District. This process pushed hiring back to the late summer, which led many qualified new teachers to seek positions in other districts with more expeditious hiring processes. According to a Research for Action report on Philadelphia’s teacher-hiring and school-assignment practices:

Philadelphia’s teacher quality initiatives . . . remain hobbled by provisions in the teachers’ collective bargaining agreement that result in an unusually centralized system of assigning teachers to schools and in the practice of filling vacancies with teachers transferring from other schools and positions before hiring new teachers. This practice slows down the hiring timelines for new recruits. . . . Similarly, most schools have little choice over the assignment of veteran teachers to their buildings; these teachers have the automatic right to fill a vacancy (in an area for which they are qualified), based on seniority.⁹

Although 44 schools within the District had been designated “site-based selection” schools, a process that required a 55% majority vote by teachers within the school and allowed principals to manage the hiring process in conjunction with human resources, many principals deemed site selection to be impossible at their schools. “I am not a site-selection school,” noted one principal. “I am a very heavy, heavy union school and would never be able to have site selection. My school is a strong union threshold because I have a lot of teachers with a lot of seniority, veteran teachers.” One Campaign member strongly in favor of site-based selection noted, “You have to have school-based hiring. The principals and their staff need to have a major say in who teaches in the building. That just goes without saying, that is so obvious that it is ridiculous to even spend more time on it.” Although this issue was subject to negotiations between the District and the PFT, Campaign members remained adamant about including this recommendation in the Blueprint document.¹⁰

Additional enhancing of the professional environment recommendations Several additional recommendations were made that focused on increasing teacher supply such as improving utilization of retired educators, changing the hiring timetable to make Philadelphia more competitive, improving teacher-allocation processes, implementing an online application system, and using creative ways to weed out weak candidates.

⁹ Elizabeth Useem and Elizabeth Farley, “Philadelphia’s Teacher Hiring and School Assignment Practices: A Comparison with Other Districts,” Research for Action, April 2004.

¹⁰ This debate was exacerbated by the fact that under Act 46, the SRC had the power to terminate the PFT collective bargaining agreement.

Maximizing Communication and Engagement with Teachers

The fifth theme of the Campaign recommendations was to improve the communication between teachers in order to facilitate the process of problem solving. The District had been criticized in the past for its top-down communication style, thus Campaign members recommended that strategies be implemented to include teacher input and communication across teachers within the District.

Initial Reactions to Campaign Recommendations

The Campaign recommendations were well received on the whole by District staff and external stakeholders, and Hanna was pleased with the outcome. The dedication of committee members and the quality of the Blueprint report made it clear to Hanna that they had “pulled off something very special.” Campaign members had worked tirelessly from November 2002 through February 2003 to produce this pivotal foundational document; however, their work was not complete, as the leadership development component of the Campaign still needed to be fleshed out. Thus, Hanna and his team began to refer to the recruitment and retention recommendations from the Blueprint report as “Phase One” of the Campaign, while “Phase Two,” which would focus on leadership development, was about to be launched in March 2003.

Phase Two Recommendations: Leadership Development

Phase Two of the Campaign was designed to help principals provide better support to teachers. Given that Phase One focused on bringing teachers in the door, Hanna and the other Campaign members wanted to make sure to retain teachers. Hanna fully believed that “retention sits with the principal” and wanted to provide principals with strategies to improve retention. Linda Grobman, regional superintendent, and Carolyn Green, Sunoco vice president, both of whom were involved in Phase One of the Campaign, were selected to cochair the leadership development committee for Phase Two. Green commented:

The biggest conclusion we drew in the initial stage is that the principal sets the tone in the school and teachers stay at a school where they feel they are supported, where they feel there is a management structure that gives them room to grow. If those principals don’t know how to support the teachers, the teachers aren’t going to be successful. We really needed to make sure the principals had the tools they needed.

On March 28, 2003, a survey was administered to principals at their regional meetings to develop baseline information and identify key problems that needed to be addressed in the Campaign’s second phase. A total of 202 out of 292 surveys administered were completed. Survey results indicated a deep need to hold a principal summer academy focused on teacher retention and the need to institute a principal leadership academy to begin the process of cultivating and training aspiring principals.

Principal Summer Academy

Over the next three months, the leadership development committee established an 18-hour, three-day principal summer academy to be instituted in the summer of 2003. The summer academy for the over 250 principals in the District was aimed at assisting principals in improving their support of “rookie, novice, and veteran teachers.” The content of the session was developed by a team of principals, regional superintendents, District administrators, and external experts.

Principal Leadership Academy

The leadership development committee also conceptualized a principal leadership academy at which 40 aspiring certificated principals would be invited to attend monthly seminars beginning in the spring of 2004. Hanna noted, “We felt that this notion of teacher retention is a function of leadership, and so we thought let’s take a shot at training the new principals coming in.” Key topics of discussion would include effective organizational leadership (March 2004), achieving cultural diversity (April 2004), maintaining a positive school climate (May 2004), teaching to proficiency (June 2004), and engaging parents and the community (June 2004).

Implementation of Campaign Recommendations

In May 2003, the Campaign and its committees were disbanded. Campaign members within the District set out to implement Campaign recommendations in conjunction with District administrators. To keep all Campaign members apprised of progress, a quarterly Campaign for Human Capital newsletter was launched in the fall of 2003. In addition, an update meeting was held in December 2003 to inform committee members of the current status of the Campaign.

In order to kick off the implementation process, Hanna met with key representatives from each administrative office within the District. Among these were budget and finance, which would be responsible for pushing up the hiring timeline, and human resources, the owner of key recruitment and teacher-assignment recommendations such as the hiring of new teachers, new-teacher coaches, and “Rolling out the Red Carpet.” Implementation for the remainder of the initiatives such as developing the content for the principal summer academy would reside with Hanna’s group. In addition, Hanna secured \$11.2 million to fund key recommendations. Nine million dollars would come from Title I funds, while the remaining \$2.2 million would come from the District’s operating budget (see **Exhibit 10** for the Campaign budget).

Budget and Finance

Hanna had laid the groundwork for pushing up the hiring timeline by convening a small group of individuals from budget and finance in December 2002. Given that the director of budget and finance, Wayne Harris, was a member of the Campaign and a cochair of one of the issues committees, Harris was cognizant of many of the key issues being addressed in the Campaign and mobilized his group to address the hiring timeline. Hanna began meeting with Harris’s group monthly over three months. Collectively, the group laid out a timeline that ideally would result in new teachers being hired by June 30, 2003.

Human Resources

Following the publishing of the Blueprint document, Hanna began meeting with Maryann Greenfield, the day-to-day director of recruitment and examinations, and her staff. Hanna scheduled a retreat with the staff at which he and the acting executive director of human resources, Ann Scanlan, and a pro-bono consultant walked them through the entire Blueprint document and showed them areas in which Hanna would need their help. Scanlan had assumed the roles and responsibilities of the recently departed executive director of human resources in November 2002. According to Hanna, “The human resources team was very supportive of the Blueprint recommendations; however, they wanted more specific direction on how to effectively implement the recommendations.” Specifically, concerns were voiced around hiring new-teacher coaches and

addressing some of the hiring recommendations that would be impacted by the PFT contract. The human resources team was uncertain as to how to implement recommendations such as “spreading out hiring” when it was incredibly difficult to figure out the number of vacancies in advance of vacancies being reported. Some complained about the culture of the District, in which “it was the norm for vacancies to be reported in the last three weeks in August.” To remedy these concerns, Hanna held three additional staff meetings and began to check in daily with Greenfield to discuss questions and progress with the recommendations.

Hanna’s Team

Hanna’s own team, composed of Swamickannu, Olmo, and Weiner, was responsible for implementing the remaining recommendations including developing the content for the principal summer academy. For this initiative, the team lobbied Chief Academic Officer Ed Williams to dedicate three out of the 10 days of mandatory principal training to retention. Once these three days were secured, Hanna and his team began working with those involved in Phase Two of the Campaign, particularly with District principals, to develop the content for the three-day retention session. In addition, Hanna’s team served as an intermediary between other District departments. For instance, the team worked with the office of curriculum, instruction, and professional development to ensure that new-teacher coaches who had been hired through human resources would receive adequate training prior to their start date.

From Implementation to Results

With careful coordination between Hanna’s team and each of the key departments within the District, the Blueprint recommendations began to yield results.

Results of Campaign Initiatives

Rolling out the red carpet and marketing campaign November 2003 marked the debut of the first Rolling out the Red Carpet, an event sponsored by Peco Energy and Freedom Credit Union at which the District hosted 45 juniors and seniors from 14 local colleges and universities that had been identified in Phase One of the Campaign. Swamickannu had worked diligently with 25 colleges and universities to launch this innovative program for college juniors and seniors. Michael Silverman, principal of the Henry C. Lea K–8 school and Campaign committee member, observed:

For the first time, the District said we are a good place to work. This is a hard job, but it’s a good place to work. And they paved the way for teachers who aspired to be in Philadelphia. They put them up in a hotel, they showed them the city, they showed them the District, they put them in our schools for a day, where they could interact with teachers, ask whatever they wanted. The District really put itself out there and said, “We shouldn’t be your last choice, this is a tough job, but you’ll love to come to work.” That I think did two things. One, a lot of people signed on the dotted line, and the second thing, it made the people in the buildings feel that the District then valued what they were doing. They were saying, “This is an important job.”

Following the first Rolling out the Red Carpet, 17% of attendees applied for teaching positions in the District. A second Red Carpet event was held in March 2004 and was attended by 65 college juniors. Given that 80% of the District’s students were minorities, Hanna and his team used the second Red Carpet event to target historically black colleges and universities, which resulted in 30

students of color attending the event. Swamickannu, a key organizer of the Red Carpet festivities, expressed delight in hearing phrases such as “wow, hey, this is not what I thought” and “gosh, this is something I could do” from students who participated in Red Carpet activities.

Rolling out the Red Carpet, coupled with the innovative new marketing campaign led by David W. Brown, Campaign member and principal of Brown Partners, a multicultural communications agency, resulted in a 25% increase in teacher applications over the prior year. Not only did the repositioning include new print materials but an upgraded Web site. In addition, one key component of the marketing campaign was a series of public service announcements (PSAs) produced in partnership with the Philadelphia Eagles Football Club that emphasized some of the benefits of teaching in the District (see **Exhibit 11** for samples of marketing materials).

Moving up the hiring timeline The key to implementing Campaign hiring recommendations was to move up the date school allotments were received by human resources (HR). Prior to HR involvement, schools worked with both budget and finance and the office of school-based resources to finalize allotments. Once HR received these allotments, then the District could begin the mandatory transfer process stipulated by the PFT contract. Under the contract, teachers with seniority had four weeks to transfer before any new teacher was hired. According to Janice Wagman, director of employment operations, Vallas had “been pushing to move the timeline from getting the allotment information to HR in May to getting the information much earlier.” Thus, the goal was for HR to receive allotments by April, begin the transfer process in May, and hire new teachers in June.

As a result of the Campaign and the push from Vallas, HR had received school allotments by April 15, 2003, pushing the hiring timeline up one month. Despite this accomplishment, the District did not reach its goal of hiring new teachers in June 2003. In the spring of 2003, the District received additional funds from the state that allowed schools to hire additional teachers. This funding situation reopened the budgeting process, forcing schools to revisit the allotments that had been given to HR in April. “We were planning to begin transfers the first week of May and then begin hiring new teachers in June, which has never been done,” noted Wagman. “Unfortunately, this did not happen. But that’s what our goal was, and hopefully next year we will be able to accomplish it.” Wagman remained optimistic that in SY05 the District would fully accomplish its goal of hiring new teachers in June instead of July or August.

New-teacher coaches In March 2003, advertisements for the new-teacher coach position were placed on the District Web site, and by May 2003 61 new-teacher coaches had been hired. While this hiring process resulted in a slight disruption, as several of the new-teacher coaches had been pulled from the classroom, leaving vacancies in the District, the net impact of the system was positive, as demonstrated by the increase in new-teacher morale and productivity.

New teachers were generally thrilled about the new-teacher coach system. One new teacher at Catherine Elementary School discussed her relationship with her new-teacher coach, Sabrina Scott-Feggins:

I met Sabrina in September. I wasn’t sure that I’d have a new-teacher coach until I first met her, because no one had told me that I had a coach. But she was great. She came in about once a week, once or twice a week, and she observed me and gave me ideas. She gave me materials I could use in my class and helped me out because I have a difficult class this year. I have a lot of behavior problems in my class, and she was really great at giving me advice and strategies that I could use with them.

New-teacher coaches likewise felt as if they were making an impact. One coach noted, "I have one teacher in particular who's doing great, but you know what she says to me all of the time? 'Do you have any pointers? Can I do anything better?' And when I see that, and when I see that enthusiasm about them seeing me, I know I'm doing something right. I know I am." According to Hanna, new-teacher coaches had a significant impact on new-teacher retention rates across the District. Of the 1,136 new teachers hired from July 2003 through November 2003, 95% had remained with the District as of March 2004. This was substantial improvement from the same period the year before when, out of 858 new teachers hired from July 2002 through November 2002, only 73% had remained with the District as of March 2003.

Despite some of these positive reactions and impressive results, several teachers complained that they wished they had seen their new-teacher coaches more often. This view was corroborated by Dee Phillips, special assistant to the president of the PFT. "I mean, there are some new teacher-coach ratios that are 20:1, which means that those coaches are not as effective as we would like for them to have been," noted Phillips. "They can't get to see those teachers as often as they would like to."

Furthermore, many principals mentioned frustrations with frequent scheduling changes of new-teacher coaches, which often caused disruption in the classroom for new teachers. Some principals had never even seen new-teacher coaches in their buildings and questioned the efficacy of this program.

Principal Summer Academy and Principal Leadership Academy The Principal Summer Academy had been viewed as a resounding success by numerous principals. Lois Powell-Mondesire, principal of Strawberry Mansion High School, commented, "I think that it was the first time principals got the chance to come together to give feedback, dialogue, and share insights on what we need to do to keep new teachers, and how we can keep our better teachers, help them change, and help them to grow."

One major deliverable from the summer academy was that each principal had to develop a detailed retention plan highlighting how they would increase retention among new and veteran teachers in their schools (see **Exhibit 12** for a sample principal action plan). As a result of this disciplined approach, by April 2004, the District had only experienced 14 teacher vacancies compared with 102 vacancies in April 2003. These results coupled with the 95% new-teacher retention rate were evidence of the Campaign's effectiveness to Hanna and Campaign members.

Furthermore, the Principal Leadership Academy had attracted the attention of the Broad Foundation, a nonprofit that provided grants to assist urban school districts in strengthening and improving their leadership. Based on the success of the initial sessions, Hanna and his team had submitted a grant to Broad to fund the development of the Academy of Leadership in Philadelphia Schools (ALPS), which would support new principals, incumbent principals, and assistant principals in the District and provide them with preservice training over three years.

Overall Reactions to the Campaign

One of the highlights of the Campaign, as expressed by numerous internal and external stakeholders, was the Campaign's ability to unite individuals from various sectors in Philadelphia to develop a robust blueprint for teacher retention and recruitment.

Internal Stakeholder Perspectives

Many District representatives involved in the Campaign were pleased that the Campaign had “opened the eyes” of external stakeholders to some of the challenges faced by the District. Campaign members valued the level of collaboration and the fresh perspective of the diverse community participants. Principals and teachers were particularly impressed with the improved retention rates and by the recruitment efforts, which allowed them to fill vacancies in a timely fashion. While few teachers were fully aware of the Campaign, several new teachers praised the new-teacher coaching program and its impact on teacher performance in the classroom.

However, several District staff members felt the Campaign should have been more inclusive of District staff. One human resources manager observed:

Initially I didn't think that they involved school district people enough. It was overwhelmingly people from outside the school district on the Campaign. There were a handful of school district people that were involved. I mean, a very, very small number of employees. Being very parochial, the human resources department should have had more representation. I really think staff needs to be involved more closely in some of the committees, with the view that they should be there to listen and bring back new ideas, because it lets you implement things without getting it whispered down the lane. So I just think that would be a better approach. Hearing recommendations secondhand makes it a little more difficult.

Furthermore, many were concerned about the structural challenges associated with implementing the Campaign recommendations. With uncertainty surrounding the outcome of the PFT contract negotiation in August, some questioned the feasibility of fully capitalizing on all of the Campaign recommendations.

External Stakeholder Perspectives

Having worked with the District for 10 years through IBM's Reinventing Education program, Dianne Melley, an IBM corporate community relations executive and committee member, praised the Campaign for “having all of the right components.” Melley explained:

If you look at the Campaign as a change initiative, all of the necessary factors were in place, beginning with Mr. Vallas's senior leadership and vision for what he wanted the Campaign to accomplish. Rosemarie Greco's ability to energize leaders from the business community was also key, particularly her personal involvement and commitment to Tomás Hanna. In turn, Tomás implemented the senior leadership's vision in an extremely efficient and effective way. This was really the very best-run initiative I have seen the District undertake.

Other corporate executives involved in the Campaign likewise felt that it was well organized and executed. However, some noted that “having it occur over a very limited period was one of its strengths, but also one of its weaknesses,” as the effort was a substantial undertaking.

Steve Gulkus, Campaign committee member and chair of the education department at Arcadia University, attributed much of the Campaign's success to Hanna's leadership. “Tomás was the one who really organized this,” observed Gulkus. “He selected a group of people who were very interested in making a difference. These were people who were willing to work.” Many others pointed to Hanna's leadership style and his ability to inspire committee members and to “talk and walk in people's shoes” as a key driver of the success of the Campaign.

George DiPilato, president of The Commonwealth Association for School Administrators (CASA), pointed to the limited number of vacancies at the start of SY04 as an indicator of the success of the Campaign. "As a result of the committee's efforts," observed DiPilato, "we went into areas that we heretofore did not ever follow up on or go into." Phillips from the PFT considered the structure of the Campaign to be a key asset. "If other initiatives are put together by the District, they should model the Campaign for Human Capital. Bringing in all the stakeholders and getting the city involved in this campaign made a difference," stated Phillips.

Like Phillips, Greco was impressed at the degree to which this "rare public-private partnership" had resulted in shared accountability for achieving the vision and mission of the Campaign for all involved. However, Greco felt that the speed of the Campaign had resulted in some glitches along the way:

I'm not sure that we took enough time early on, and I realize that there was that urgency of getting started. But enough time early on to not only communicate, but to translate for principals and existing teachers what this would mean for them in a positive way going forward. I think this could have helped us avoid early skepticism and fear on the part of folks when we first got started.

Greco's perspective was echoed by several internal stakeholders within the District.

Challenges Going Forward

Despite the successes of the Campaign, Hanna remained concerned about several long-term issues related to the Campaign. There were many possible outcomes of the upcoming PFT contract negotiations. If the topic of site-based selection was not addressed, the District might not be able to sustain the impressive recruitment rates that had resulted from the Campaign. One SRC member commented on the PFT negotiation:

Site-based selection is the number one issue for us. We must create a system that gives the District, through our principals, the responsibility and the authority to match a teacher's skill and experience with the school's and student's needs. Our current seniority-based system has led to a district in which our most academically challenged students are in schools with the least experienced teachers and with high rates of teacher turnover. Site-based selection is a very important part of our strategy to place a qualified teacher in every classroom. I don't think our reform agenda will succeed without it.

Hanna also wondered how to institutionalize the Campaign from an organizational perspective, as he believed it was still unclear "where the leadership development sits and where all of the teacher recruitment and retention sits in the organization." Specifically, Hanna wondered how the Campaign would continue to yield results when there was no direct reporting relationship between his department and each of the departments responsible for implementing the Campaign recommendations. Dungee Glenn noted, "We were a special project to produce a plan, but we must now integrate our plan into the way the school district retains and recruits teachers and professionals. I mean the Campaign is just a catchy name under which this was undertaken, but we really want it to become the way we do business."

Other Campaign committee members questioned how the Campaign would dovetail with Vallas's newer initiatives, as "careful meshing" would be required so that individuals within the District could understand how each initiative fit into the larger District strategy.

What's Next?

Hanna began to review the draft of the Spring 2004 Campaign newsletter, which needed to be sent to the printer in less than one week. Hanna was distracted by his visits to five schools over the past day and a half. One of the questions lingering in his mind was whether the Campaign had truly done enough to support teachers and principals. He explained:

If you were to ask me what keeps me up at night, it is figuring out what comes next within the Campaign. How do we as a central office, regional offices, human resources, operations, all of these offices, curriculum, professional development . . . how do we, in fact, make the job more doable for teachers and principals. The principal's job in its current state—some would say it is undoable because we are dealing with so many issues.

Hanna rose from his desk and opened the door to his office to talk to his assistant. His perplexity over what would come next and some of the structural changes that would have to take place in the District for the Campaign to succeed made him yearn to visit another set of classrooms. "It is all about the kids," Hanna reminded himself. "It is about the kids who have been counted out, kids who people don't care about." Hanna needed to schedule additional school visits to help him refocus on the ultimate goal of the Campaign.

Exhibit 1 The School District of Philadelphia Facts and Figures

Overview	SY04
District Area Demographics	
Total Population ^a	1,517,550
Per Capita Income (in 1999)	\$16,509
Families below poverty level (in 1999)	18.4%
Percent of county residents holding college degrees	10.3%
Unemployment (2004) ^b	4.7%
Student Demographics	
Number of students (K-12)	214,350
African-American	65.3%
White	15.1%
Hispanic	14.5%
Asian	4.9%
Native American	0.2%
Eligible for free and reduced-price lunch	80.0%
Special education enrollment rate ^c	11.9%
Limited English Proficient (LEP) enrollment rate ^d	6.6%
Graduation rate ^e	60.5%
Dropout rate ^f	9.8%
Schools & Staff	
Number of schools	276
Elementary	177
Middle	43
High	36
Vocational-technical	6
Special	14
Total headcount	~22,000
Teachers	~11,000
Average teacher salary ^g	\$50,971
Student/teacher staffing ratio (Elem, Middle, High)	~30:1

Source: Data from <http://www.philsch.k12.pa.us> unless cited otherwise.

^a "School District Demographics," Census 2000 Web site, <http://www.nces.ed.gov/surveys/sdds/singledemoprofile.asp?county1=4218990&state1=42>, accessed June 15, 2004.

^b "Philadelphia Area Unemployment Rate Falls to 4.7 Percent in December; Job Count Rises by 15,500 From a Year Ago," Bureau of Labor Statistics Web site, <http://stats.bls.gov/ro3/cesqphl.pdf>, accessed June 15, 2004.

^c "Philadelphia School Profile," Pennsylvania Department of Education Web site, <http://www.paprofiles.org/profiles/district.Asp>, accessed June 18, 2004.

^d Ibid.

^e "Philadelphia School Profile," Pennsylvania Department of Education Web site, <http://www.paprofiles.org/profiles/PrintDistrictProfile1.asp>, accessed June 18, 2004. Data is from SY02.

^f Standard & Poor's School Evaluation Services Web site, <http://www.ses.standardandpoors.com/>, accessed June 17, 2004. Data is from SY02. Dropout rate is a one-year snapshot of all students who drop out of school during one year. This rate considers all students in grades 9–12.

^g Standard & Poor's School Evaluation Services Web site, <http://www.ses.standardandpoors.com/>, accessed June 17, 2004. Data is from SY02.

Exhibit 2a Average PSSA Scores by Subject and Grade, Philadelphia and Statewide, 1996–2002^a

		1996	1997	1998	1999	2000	2001	2002
Reading								
<i>Grade 5</i>								
	Philadelphia	1090	1110	1090	1120	1140	1140	1150
	Pennsylvania	1300	1310	1310	1310	1320	1310	1320
<i>Grade 8</i>								
	Philadelphia	1080	1140	1120	1130	1120	1130	1140
	Pennsylvania	1300	1300	1300	1310	1310	1310	1310
<i>Grade 11</i>								
	Philadelphia	1160	1140	1140	1140	1130	1180	1170
	Pennsylvania	1300	1300	1300	1300	1300	1300	1320
Math								
<i>Grade 5</i>								
	Philadelphia	1100	1130	1140	1140	1140	1150	1150
	Pennsylvania	1300	1300	1310	1300	1310	1310	1320
<i>Grade 8</i>								
	Philadelphia	1070	1110	1120	1120	1130	1150	1170
	Pennsylvania	1300	1300	1300	1300	1310	1310	1320
<i>Grade 11</i>								
	Philadelphia	1170	1130	1120	1140	1160	1190	1180
	Pennsylvania	1300	1300	1300	1300	1310	1310	1320

Source: "School District of Philadelphia Announces PSSA Results," School District of Philadelphia press release, October 17, 2002; "Pennsylvania State Profile," Pennsylvania Department of Education Web site, <http://www.paprofiles.org/profiles/DistrictAssessments.asp> and <http://www.paprofiles.org/state20012002.pdf>, accessed June 17, 2004.

^aParticipation in the writing portion of the PSSA was optional until 2000 and therefore not included in the table for comparison.

Exhibit 2b PSSA Results by Score Distribution Group, Philadelphia and Statewide, 2002

		Advanced	Proficient	Basic	Below Basic
Reading					
<i>Grade 5</i>					
	Philadelphia	4%	17%	27%	52%
	Pennsylvania	18%	39%	23%	20%
<i>Grade 8</i>					
	Philadelphia	4%	20%	27%	49%
	Pennsylvania	20%	38%	21%	21%
<i>Grade 11</i>					
	Philadelphia	5%	24%	25%	46%
	Pennsylvania	16%	43%	21%	20%
Math					
<i>Grade 5</i>					
	Philadelphia	6%	13%	22%	59%
	Pennsylvania	26%	27%	22%	25%
<i>Grade 8</i>					
	Philadelphia	3%	15%	22%	61%
	Pennsylvania	18%	34%	21%	27%
<i>Grade 11</i>					
	Philadelphia	9%	15%	20%	57%
	Pennsylvania	23%	27%	21%	29%

Source: "Philadelphia School Profile," Pennsylvania Department of Education Web site, <http://www.paprofiles.org/profiles/DistrictAssessments.asp>, accessed June 17, 2004; "Pennsylvania State Profile," Pennsylvania Department of Education Web site, <http://www.paprofiles.org/state20012002.pdf>, accessed June 17, 2004.

Exhibit 3 School Reform Commission (SRC) Powers under Act 46

The SRC was created under Act 46 of the Pennsylvania School Code. The SRC acts in place of the Philadelphia Board of Education and has complete control of every aspect of Philadelphia Public Schools. Under the Act 46, the SRC can:

- Suspend the Pennsylvania School Code
- Suspend the State Board of Education regulations
- Hire, or delegate its power to, for-profit corporations to manage the school district
- Turn over public schools to private groups and corporations
- Hire noncertified teachers and managers
- Reassign, suspend, or dismiss professional employees
- Terminate collective bargaining agreements
- Levy taxes and incur debts

Source: The General Assembly of Philadelphia Senate Bill No. 640 Web site, <http://www2.legis.state.pa.us/WU01/LI/BI/BT/2001/0/SB0640P1473.pdf>, and <http://www.savephillyschools.org/schoolboard/>, accessed July 27, 2004.

Exhibit 4 Excerpt from Philadelphia Federation of Teachers (PFT) Contract—Section IX. Employment Security

A. Seniority

1. An employee shall have both school system seniority and location seniority. Professional/Technical employees and Food Service Managers shall also have departmental seniority.
2. When the term location seniority is used, it shall include seniority accumulated at any school, center or other work location.
3. Wherever, in this Agreement, reference is made to seniority as the basis for decision, it shall mean that the person with the highest seniority of the type of seniority specified shall receive preference.

4. Seniority shall be determined as follows:

(a) School system seniority of an employee shall date from the beginning of his/her continuous appointment in any classification in any bargaining unit represented by the Federation as an appointed employee.

(b) Location seniority shall be the continuous length of service as an appointed employee in the present school, center or other work location except that an employee's length of service as an appointed employee in a previous work location shall be included under the following circumstances:

- (1) If he/she is involuntarily transferred to his/her present work location by the Board;
- (2) If he/she transferred by his/her application into a work location and then was involuntarily transferred from that work location, he/she shall carry the sum of length of service in both previous locations to the new location.

(c) Departmental seniority is defined as uninterrupted, continuous service by an appointed employee in the collective bargaining unit in a department of the School District. He/she shall lose all accumulated departmental seniority if he/she voluntarily transfers as an appointed employee to a position in another department. If the employee returns to the former department within one (1) year, he/she shall retain his/her seniority accumulated in the department to which he/she returns.

When an employee accepts an appointment to a permanent position outside the bargaining unit, his/her seniority shall cease to accumulate. Should such an employee return to a position in the bargaining unit within one (1) year of the date on which he/she left his/her position in the bargaining unit, his/her departmental seniority shall be the sum of his/her departmental seniority prior to his/her appointment to a position outside the bargaining unit and his/her departmental seniority from his/her date of return to a position in the bargaining unit.

5. When location seniority is equal, school system seniority shall be the determining factor. Continuity of appointed service shall not be broken by any period of approved leave without salary but such period shall not be included in the calculation of length of service.
6. When length of service in the system is equal, the date of the eligibility list from which the employee was appointed shall be the determining factor.

7. When appointment was made from the same eligibility list, the comparative score on that eligibility list shall be the determining factor.

8. An employee who is appointed, without interruption, from the status of appointed employee in one bargaining unit represented by the Federation to the status of appointed employee in another bargaining unit represented by the Federation, shall retain his/her system seniority. Subject to the provisions of paragraph 13 below, no period of service as a per diem or long-term substitute, or provisional employee or intern (except intern psychologist) shall count in the calculation of an employee's location or school system seniority.

9. A seniority list of all employees in a department or location shall be maintained in that location and kept current during the school year. The list shall be available to all employees. School system seniority shall also be compiled and kept updated.

10. The Office of Human Resources shall make available to any employee his/her school system seniority as it may affect or contribute to the resolution of any specific problem.

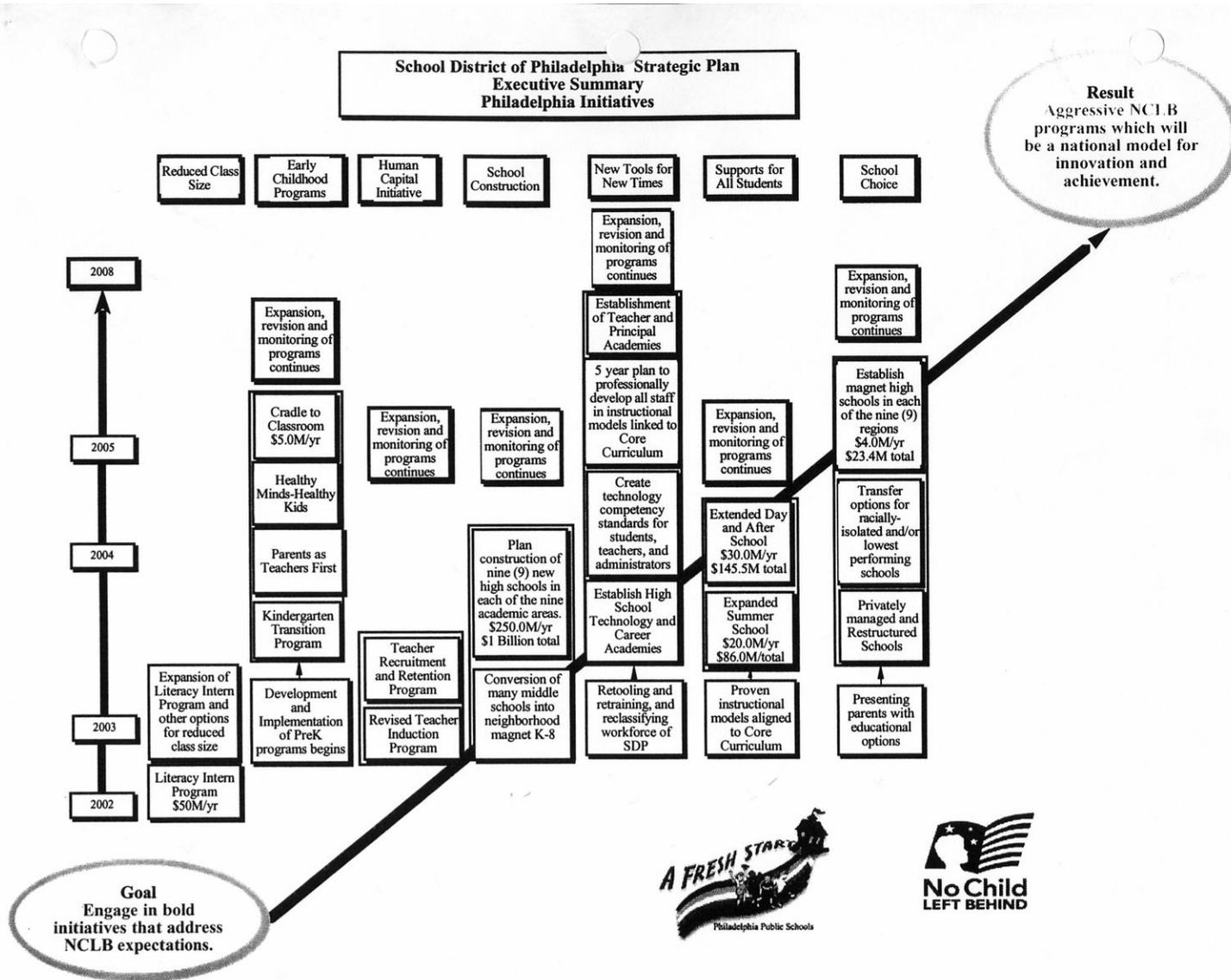
11. A layoff of one (1) year or less shall not be considered a break in service.

12. Any employee who is laid off up to one (1) year shall have all time in layoff status counted as service time for seniority purposes.

13. Upon completion of certification requirements and after successfully completing the School District's examination procedure, Apprentice Teachers and Literacy Intern Teachers shall have system seniority retroactive to their date of hire and location seniority retroactive to the first day of the month in which their instructional certificate was issued; Provisional Teachers will have both system and location seniority retroactive to their date of hire.

Source: Pennsylvania Federation of Teachers Web site, <http://www.pft.org/contract/contract2000.html>, accessed June 17, 2004.

Exhibit 5 Executive Summary of "Students Succeeding"



Source: The School District of Philadelphia.

Exhibit 6 Campaign for Human Capital Members and Committees**WORK TEAM**

Sandra Dungee Glenn
 Rosemarie B. Greco
 Tomás Hanna
 Zoraida R. Olmo
 Arasi Swamickannu
 Debra Weiner

STEERING COMMITTEE

Sandra Dungee Glenn, Co-Chair – Campaign for Human Capital
 Rosemarie B. Greco, Co-Chair – Campaign for Human Capital
 June Barry, Senior Vice President, Citizen’s Bank
 Lance Berger, Lance Berger & Associates
 Tabb Bishop, Deputy Chief of Staff, Temple University
 David Brown, Principal, Brown Partners
 Gene Castellano, Pennsylvania Academy of the Fine Arts
 Robert Croner, Vice President, Independence Blue Cross
 James Cuorato, Director of Commerce, City of Philadelphia
 John K. Dipaolo, Office of the President, Temple University
 Dr. George DiPilato, Commonwealth Association of School Administrators (CASA)
 Segun Eubanks, Dir. of Teacher Quality, National Education Association (NEA)
 Joseph Frick, Senior Vice President, Independence Blue Cross
 Nilsa González, Officer of School Management, School District of Philadelphia
 Carolyn Green, Vice President, SUNOCO
 Linda Grobman, NW Regional Superintendent, School District of Philadelphia
 Tomás Hanna, Special Assistant to CEO, School District of Philadelphia
 Lydia Hernández-Vélez, Aspira Inc. of Pennsylvania
 Rear Admiral Virgil Hill (retired)
 Jerry Jordan, Vice President, Philadelphia Federation of Teachers (PFT)
 Debra A. Kahn, Secretary of Education, City of Philadelphia
 Ted Kirsch, President, Philadelphia Federation of Teachers (PFT)
 Diane M. Melley, Corporate Community Relations Executive, IBM
 Natalye Paquin, Chief of Staff, School District of Philadelphia
 Lois Powell-Mondesire, Principal, School District of Philadelphia
 Patricia Raymond, President, Philadelphia Home & School Council
 David E. Roberts, Assistant Regional Director, PHEAA
 Rosie Saez, Senior Vice President, First Union National Bank
 Ann Scanlan, Acting Human Resources Director, School District of Philadelphia
 Dr. Leonard Soroka, Dean, School of Education, Holy Family University
 Arasi Swamickannu, Special Projects Assistant, School District of Philadelphia
 Salome Thomas -El, Principal, School District of Philadelphia
 Debra S. Weiner, Director of School Partnerships, Philadelphia Futures

ISSUES COMMITTEES

Harold Adams	Pamela Crawley	Lindsay Johnston	Aida A. Nevarez-Latorre
Sharn Albert	Donald DiLoreto	Carol M. Jones	Dee Phillips
Natalie Allen	Dr. Joseph P. DuCette	Yvonne Jones	Dr. Fredericka Reisman
Susan Anderson	Taneema Fannings	Deborah Jumpp	Craig Robbins
Deidre Bailey	Valerie Ferguson	Larry Keiser	Peggy Shane
Joseph Barrett	Charles Friedberg	Tracie Kelley	Melonease Shaw
Scott Bass	Yolanda González	Arlene Kempin	Lori Shorr
Dionne Beaman	Wilmarie González	Helen Krewson	Lorraine R. Sikora
Vivian Bolt	Dr. Steven P. Gulkus	Colleen Lambe	Marianne Smith
Robert Brand	Helen Gym	Karen Lash	Mary Ann G. Smith
Jessica Brown	Rhonda Hall	George Lyons	Sharon A. Smith
Duane H. Bumb	Linda Harris	Estelle Matthews	Patricia Snead
Lani Carrow	Wayne Harris	Nancy McGinley	Deborah Stephens
Clem Cheng	Stacey Holland	Rebecca Meyer	Elizabeth Useem
Al Chiaradonna	Eldridge Holloway	William Mikus	Herbert Wetzal
Susan Coan	Dr. Tony Johnson	Diane Moore	Kelly Wolfington
Amy Cohen	Duane Johnson	Allie Mulvihill	

Source: The School District of Philadelphia Office of Recruitment and Retention.

Exhibit 7 Sample Committee Goals and Tasks—Recruitment and Infrastructure Committees

Goals and Tasks for the Recruitment Committee

Goal: To fill new vacancies for 9/03; to increase from 25% to 50% the percentage of new teachers certified in PA or other states who are most likely to be effective in urban classrooms.

Tasks:

1. To examine the strategies used by the urban districts that have done the best in recruiting certified teachers and determine their unit costs.
2. To identify the local strategies/materials that have produced the best yield and have determined their unit costs.
3. To identify Pennsylvania colleges of education that have produced the largest number of new certified teachers and those which have produced the largest number for Philadelphia in the past five years. To formulate short- and long-term strategies for recruiting their graduates.
4. To identify colleges of education in other cities that produce large numbers of new teachers.
5. To identify Historically Black Colleges and Universities that produce large numbers of certified teachers.
6. To examine recruiting strategies/messages from higher education institutions in attracting students; and from corporations that have been most effective in recruiting recent college graduates.
7. To examine strategies and model programs for diversifying the applicant pool (particularly for recruiting male teachers).
8. To formulate strategies for supporting the Urban Education Academy and for instituting teaching academies in the proposed new high schools or creating a new high school.
9. To determine which functions can be done in-house, and which can be outsourced.

Goals and Tasks for the Infrastructure Committee

Goal: To increase, by 50%, new teacher (in service from 0-3 years) retention by 4/15/04.

Tasks:

1. To review all District data on retention for the past five years and correlate changes with particular strategies/programs (e.g. Literacy Interns, etc.).
2. To design a revised teacher induction program and ways to implement.
3. To institute a universal pre-service preparation program for new teachers.
4. To institute system-wide site selection.
5. To examine strategies used in urban districts with the highest retention rates in the first three years.
6. To assess the roles and impact of coaches, mentors, principals, and others responsible for supporting new teachers.
7. To identify changes needed in recruitment timetables to ensure that job offers are timely in comparison to other school districts.
8. To redesign the hiring timetable to accommodate extended training in August for all new teachers adapted to their certification status and experience.
9. To design an approach to ongoing professional development that matches training with individual teacher and school needs and tracks the relationship between training and classroom effectiveness.
10. To determine which functions can be done in-house, and which can be outsourced.

Source: The School District of Philadelphia Office of Recruitment and Retention.

Exhibit 8 Summary of Blueprint Recommendations

Theme 1: Defining Teacher Competencies

Recommendations:

- The District should identify teacher characteristics that are correlated with successful urban teaching.
- The District should pinpoint the 20 regional institutions that have historically produced the most successful teachers with the greatest longevity and identify the urban historically black colleges and universities with teacher education programs.
- The District should track teacher performance against the tools used to select teachers in order to ensure that selection processes are valid and effective.

Theme 2: Marketing the District's Competitive Advantages

Recommendations:

- The District should undertake an aggressive print, electronic, and in-person marketing campaign.
- The District should aim for a salary scale at the 50th percentile of districts in the surrounding four counties in preparation for the next PFT contract.
- The District should immediately implement a \$1,000 per teacher annual reimbursement for certification/recertification courses.

Theme 3: Collaborating Strategically with External Stakeholders

Recommendations:

- The District should work more closely with teacher education institutions to 1) enhance classroom preparation for incoming teachers, 2) encourage local institutions to require at least one semester of student teaching in District schools, 3) market teacher programs to outstanding teachers and administrators, and 4) provide preservice training for teachers.
- The District should work more closely with civic, corporate, and cultural organizations so that these institutions can provide training to District staff and cosponsor recognition events for teachers.

Theme 4: Enhancing the Professional Environment

Recommendations:

- The District should recruit retirees to fill vacancies in hard-to-staff schools and hard-to-fill disciplines and should utilize retirees as coaches for inexperienced and uncertified teachers.
- The District should institute the following human resources practices: 1) move up the hiring timetable, 2) use scores on the general knowledge portion of the PRAXIS teachers exam to screen teacher applicants, 3) give priority to teacher applicants who have been student teachers in Philadelphia and who elect to teach in a hard-to-staff school and a hard-to-fill discipline, and 4) implement an online application system.
- The District should modify the way in which it allocates teachers to each school to prevent overhiring in schools with high absenteeism, high turnover, and large numbers of new teachers.
- The District should revise the current site-selection process in the PFT contract.
- The District should provide preservice training to every new teacher, and each new teacher should have a new-teacher coach from either school or regional staff and a mentor from school staff. New teachers should also receive in-service training throughout the year provided by regional staff.
- The District should create an Office of Alternative Certification within Human Resources to support teachers entering the system without having completed certification requirements. The District should continue to expand opportunities for paraprofessionals to become teachers.

Theme 5: Maximizing Communication and Engagement with Teachers

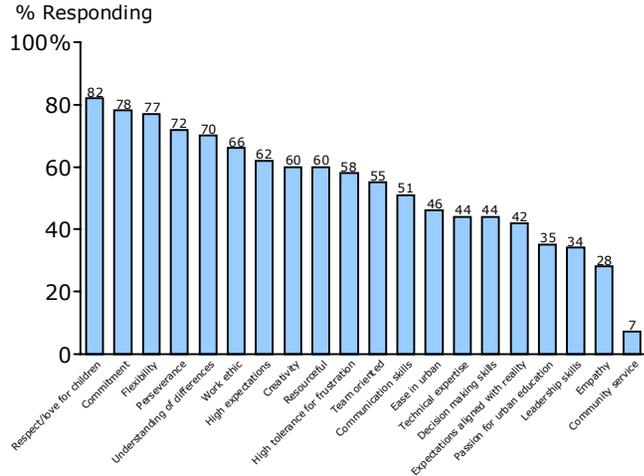
Recommendations:

- The District should alter its top-down communication style by regularly communicating essential information, expectations, and policies to all staff.
- The District should implement strategies to ensure teacher input in key decisions through annual surveys, focus groups, and online discussion forums on the District Web site.

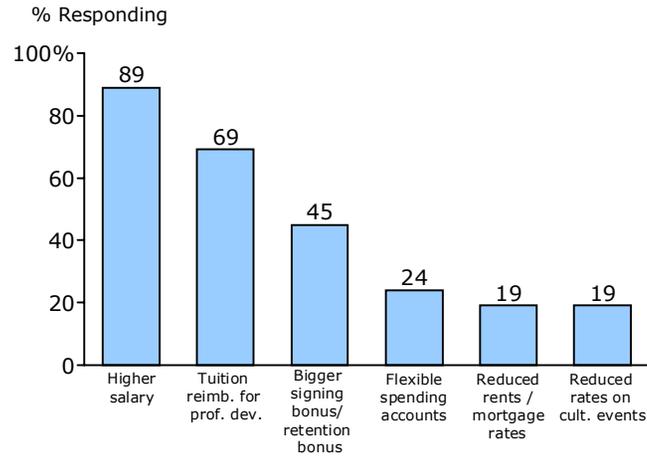
Source: Adapted from "The Three Rs Retention, Recruitment, and Renewal: A Blueprint for Action."

Exhibit 9 Sample Teacher Survey Questions

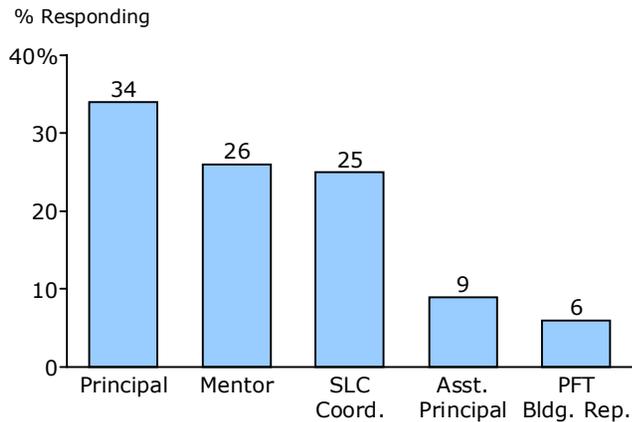
10. The School District intends to create a profile of a successful teacher, Out of the following 20 characteristics, objectively choose 10 that you think contribute most significantly to a teacher's success in the School District of Philadelphia.



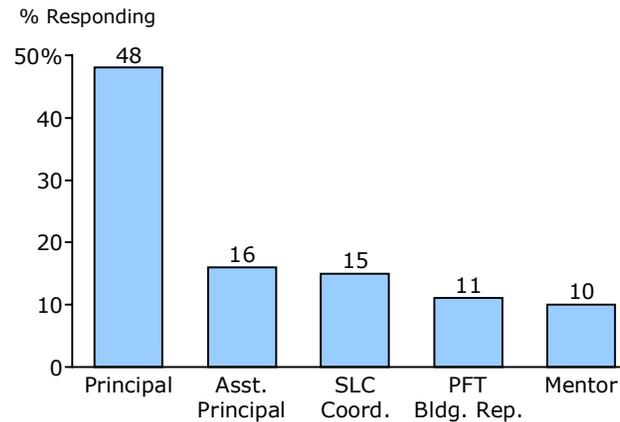
11. Which of the following incentives would be most appealing to you as a teacher? (Please choose three)



12. Which leader contributes most to your success as a teacher?



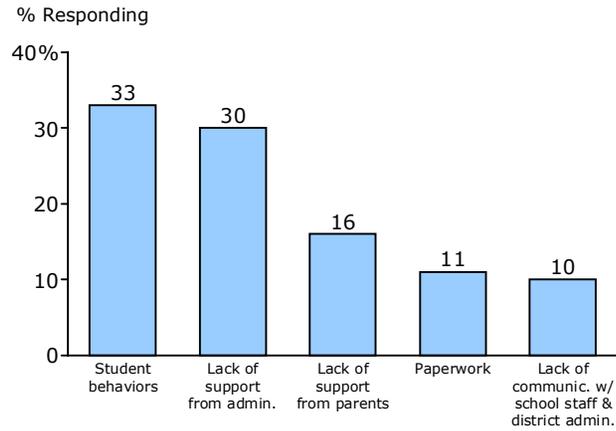
13. Which leader most impedes your success as a teacher?



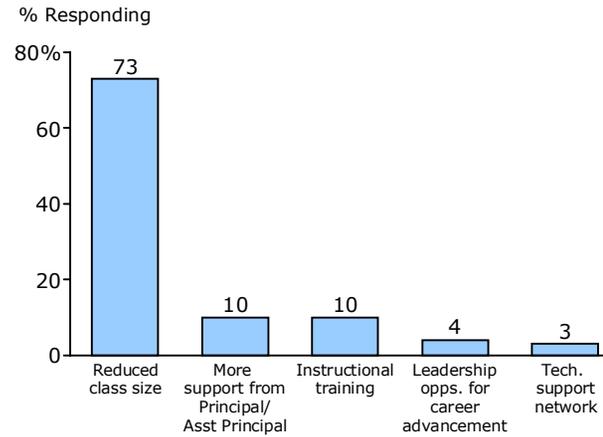
Source: The School District of Philadelphia Office of Recruitment and Retention.

Exhibit 9 (continued)

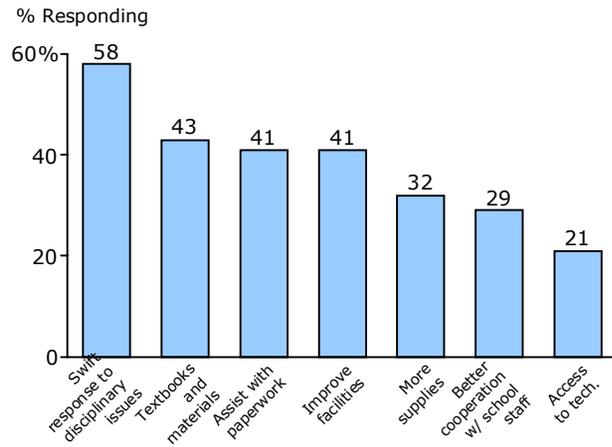
14. In your opinion, which one of the following aspects of teaching contributes most significantly to low morale among teachers?



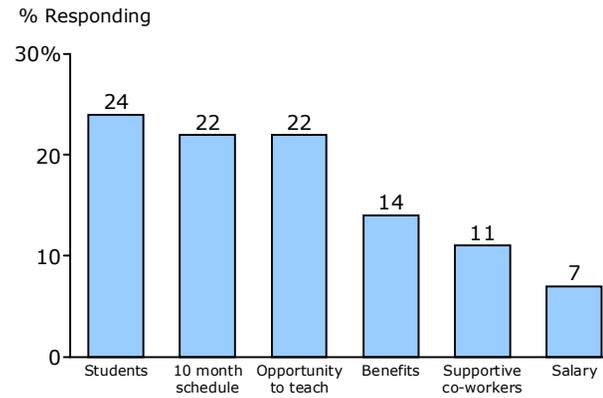
15. In your opinion, which one of the following would be most beneficial to you as a teacher?



16. If you could change three things in your school, what would they be? (Mark three)



17. What motivates you to stay in the School District of Philadelphia? (please choose one)



Source: The School District of Philadelphia Office of Recruitment and Retention.

Exhibit 10 Campaign for Human Capital Budget (remainder of SY03 through SY04)

Activity	Detail	Total Cost
Tuition reimbursement/Partial PRAXIS Reimbursement	New teachers	\$ 990,000
	Level I to II	\$ 2,792,000
	Emergency Permit	\$ 281,000
	PPTs	\$ 80,250
		\$ 4,143,250
Preservice Training for New Teachers	Uncertified teachers	\$ 600,000
	Certified teachers	\$ 300,000
		\$ 900,000
New Teacher Coaches	Salary and Benefits	\$ 5,268,000
Student Teacher Monetary Incentives	Program Costs	\$ 1,000,000
Teacher Ambassador Program	Program Costs	\$ 250,000
Philadelphia Futures	Consulting Contract Costs	\$ 50,000
David W. Brown	Marketing Contract Costs	\$ 50,000
	TOTAL	\$11,661,250
	Less External Funding	\$ (390,000)
	GRAND TOTAL	\$11,271,250

Source: The School District of Philadelphia Office of Recruitment and Retention.

Exhibit 11 Sample Marketing Materials**Radio Advertisement 1**

TEACHER: It takes a special person to do what I do. I am a public school teacher, (chuckle) that's right, a public school teacher. Most people might wonder why anybody would voluntarily surround themselves with teenagers and deal with their, shall we say, rambunctiousness. But I also get to be around when they are in the midst of self-discovery. When they are tackling a possible equation or decode the mysteries of a molecular compound. When they smile at the A on their test papers and realize that all of my lecturing was for a very good reason. Despite the attitudes these kids sometimes give me, I want to be around for those victories. Be the "corny chick" who helps them get it.

ANNOUNCER: Visit [teach in Philly.org](http://teachinphilly.org) and fill out an application to learn more about teaching opportunities in the School District of Philadelphia. That's [teach in Philly dot O-R-G](http://teachinphilly.org).

TEACHER: Some may wonder why I do the work I do. For me, the wonder I see is in the minds I touch. That's why I live, learn, and teach in Philadelphia.

Radio Advertisement 2—"City Guy"

TEACHER: Man, I live and breathe this city. There is something about the pace, the sounds, the attitudes. It just feels like home, and I can't imagine being anywhere else. I also remember what it was like being a kid here. I was one of those classroom knuckleheads. Always disrupting things, being a know-it-all. Smart, but smart enough not to look too smart because that wasn't too cool. But my teachers never gave up on me, no matter how hard I pushed. They played coach, cheerleader, sometimes even referee, to get me to focus on my future. Encouraging me to be more. There are a lot of kids out here just like me, and I can use my experience to help them make it through.

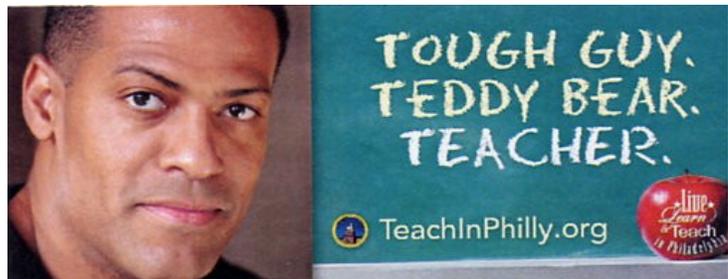
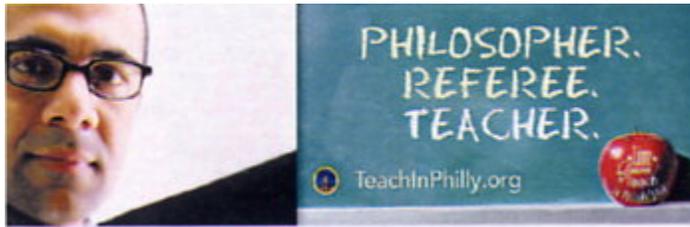
ANNOUNCER: Visit [teach in Philly.org](http://teachinphilly.org) and fill out an application to learn more about teaching opportunities in the School District of Philadelphia. That's [teach in Philly dot O-R-G](http://teachinphilly.org).

TEACHER: Every day is a challenge, but I can handle it. That's why I live, learn, and teach in Philadelphia.

Source: The School District of Philadelphia Office of Recruitment and Retention.

Exhibit 11 (continued)

Print Advertisements



Web Site Cover Page



Source: The School District of Philadelphia.

Exhibit 12 Sample Principal Action Plan

School Name _____

Leadership for Retention and Renewal

Region South

Action Plan Template

Describe current school situation (in place and needed):

To recruit teachers, we are hoping to promote our school on a web site, designed by our M.G. students. Another vehicle would be through public relations activities and by being present during district wide recruitment sessions. (This has already proven to be of great benefit.) We also provide on-going support and recognition for attendance and special programs/projects. New teachers are provided a mentor and buddy teacher who meets with them regularly. Administrators meet regularly with new teachers formally and informally and also visit their classrooms daily so that we are able to provide ongoing feedback to support their needs. We meet with any teacher new to the building at the beginning of the year to review policies and procedures, lesson planning, record keeping and curriculum and instruction. We also maintain an open door policy for all staff. This year, the math and literacy teacher leaders will meet with each grade team bi-monthly to support their implementation of the new core curriculum. We have also purchased books on classroom management strategies for all teachers and instructional strategies to support instruction.

Action Plan rationale:

We are supporting all teachers in an effort to maintain a stable staff, which is necessary to maintain an effective instructional program and also a positive climate.

R= Rookie/N= Novice/V= Veteran

Goals/Topic	Strategies/Task	R	N	V	Materials Needed	Person Responsible	Date - Timeline	Complete
1. Improve instruction	Grade meetings, one-on-one meetings, demonstration lessons, team teaching, peer observation Talent Development coaches are in our building weekly to support teachers in math, literacy and science	•	•	•	Literacy/math textbooks and core curriculum	Teachers, lead teachers, coaches	Sept. – June, 03/04	ongoing
2. Student Recognition/School Climate	High Fives As and Bs developed by Johns Hopkins for Talent Development. This is a positive program for improving climate	•	•	•	Program binders for each staff member, posters for each classroom and throughout the building	All staff and Talent Development coordinator	August- June 03/04	ongoing
3. Improve Assessment scores	Review data bi-monthly to assess student progress to inform instruction	•	•	•	PSSA, Terra Nova, Checkpoints, Benchmarks, report card marks, levels tests	All teachers	Sept.-June 03/04	Bi-monthly, each report period
4. On-line marking procedures	Turn around training for staff	•	•	•	Marking Guidelines	All teachers	Each report	Each report

Source: The School District of Philadelphia Office of Recruitment and Retention.

Exhibit 12 (continued)

School Name _____ Leadership for Retention and Renewal Region South

Goals/Topic	Strategies/Task	R	N	V	Materials Needed	Person Responsible	Date - Timeline	Complete
5. Recordkeeping	Review procedures	•	•		Blue Binders provided to each staff member, containing policies, schedules, handbooks	Administrators	Sept.	yes
6. Teacher Observations	Review informal and formal procedures (walk through protocol)	•	•	•	Samples of format to be used	Administrators	September-03/04	yes

Possible support/strategy formats: Teacher support groups, one-on-one meetings, coaching from school-based or regional resources (e.g. new teacher coaches, academic coaches, etc.)

Goals/Topic	Strategies/Task	R	N	V	Materials Needed	Person Responsible	Date - Timeline	Complete
7.								
8.								
9.								

Possible support strategy formats: Teacher support groups, one-on-one meetings, coaching from school-based or regional resources (e.g. new teacher coaches, academic coaches, etc.)

Additional ideas to be explored:

Specific needs / supports required: We are working with Talent Development this year to support all teachers with the implementation of the core curriculum. They provide us with facilitators weekly for math, literacy, science and climate.

Suggested Goals/Topics to focus on School Specific Practices

Recordkeeping - Pupil Pockets/Roll Books - Lesson Plans - Grade Books	Technology - Access - Individual Needs Assessment - Training	Special Education - Spec Ed teacher technical needs - Regular Ed teacher responsibility in IEP's
Classroom Management	Best Practices	Assessment
Student Recognition/Classroom Climate	Legal/Safety Procedures	Personal Professional Development Plans
Teacher Rating Process	Teacher Observation Schedule	Quality Classroom Expectations
Discipline Policy/Procedures - Handbook-Student, Teacher, District	Working with Parents - Principal, Teachers, & Parents	Report Card Conferences - On-line marking procedures

Create a "who's who" for your individual school (who can help new folks with needs . . .)