Acknowledgements

We offer deep appreciation to all Pilot School students, families, teachers, staff, administrators, and community members for their hard work and dedication.
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The purpose of the Pilot School framework is to create vibrant learning communities engaged in the continuous improvement of teaching and learning.

Preface

The guides project at the Center for Collaborative Education grew out of an increasing interest in Pilot Schools. Through a series of text- and Web-based guides, the project aims to make the Pilot model accessible to a wide audience in districts and schools.*

*Web guide: http://www.cce.org/pilotguides/

The Essential Guide to Pilot Schools series will provide a range of information on Pilot Schools, including leadership and governance; assessment, curriculum and instruction; budget, staffing, and schedule; and support structures. Narrative in the guides is accompanied by: 1) tools: resources and stand-alone documents, 2) vignettes: illustrations of aspects of the narrative, and 3) case studies: in-depth descriptions of a school.

The Overview guide explains the essentials of Pilot Schools: autonomy, accountability, small size, and a commitment to equity. Readers discovered data on Pilot Schools, how Pilot Schools fit into the school reform context, the power of the Pilot Schools Network, and steps for starting Pilot Schools in other districts and schools.

In this Leadership and Governance guide, readers will learn the essentials of building a strong framework in Pilot Schools, including transforming leadership roles, setting a school mission, and creating a professional collaborative culture. The guide describes the role of governing boards and election-to-work agreements in Pilot Schools, and how shared decision making and leadership are essential to these structures.

If you have any questions or comments about this guide, the Overview guide, or the guides project in general, please do not hesitate to contact us.
Pilot School status gives a school the freedom to ask, ‘What are actually doing and what do we need to change?’”

—Abby Brown, teacher, Gardner Elementary School

Introduction to Pilot Schools

The Pilot School model originated in Boston. There, they are a network of 20 innovative schools within the Boston Public Schools (BPS) that are achieving strong results across every indicator of student engagement and performance. Two Pilot Schools also have dual Horace Mann charter school status.* Pilot Schools demonstrate higher performance compared to the district averages at all grade levels, including higher college-going rates, higher results on the statewide standardized assessment (MCAS), and higher attendance rates.

Pilot Schools serve 6,400 students, 11% of BPS enrollment, and serve a student population that is generally representative of BPS. They do not select students based on prior academic achievement, and they receive a similar per pupil allocation to all BPS schools.† First opened in 1995, Pilot Schools are the result of a unique partnership of the mayor, school committee, superintendent, and teachers union, and were created to serve as laboratories of innovation and research, and as development sites for effective urban public schools. Now a reform strategy over ten years old, Pilot Schools represent a powerful collaborative approach to partnerships between teachers unions and school districts. As a result of their strong performance over time, the Pilot model is now in the process of being replicated in other cities, including Los Angeles.

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* Horace Mann charter schools are granted autonomy by the state department of education while also remaining part of the district and teachers union. There are two Horace Mann charters in Boston that have dual Pilot status, Boston Day and Evening Academy and Health Careers Academy. “Pilot Schools” will be used for simplicity, but continues to refer to the Pilot/Horace Mann Schools.
† In February 2006, the Boston Public Schools and Boston Teachers Union agreed on new Pilot School contract language that allows for 100 uncompensated hours above the contract in 2007–08. The district agreed to pay the contract rate for up to 50 required hours worked over that amount. Some Pilot Schools do require teachers to work over 100 hours above the contract hours, and thus teachers in these schools receive extra compensation.
The Center for Collaborative Education (CCE), a nonprofit organization, convenes the Pilot Schools Network and works with Pilot Schools to improve practice and results. CCE provides Pilot Schools with coaching, professional development, advocacy, research, and financial management. The Pilot Schools have demonstrated that a powerful network of autonomous schools in an urban public school district, aided by a third-party organization, is optimally positioned to create high-performing schools, promote collaboration among schools, and leverage change within the district.

All Pilot Schools share the following essential features:

- **Autonomy.** While part of the larger district, Pilot Schools exercise increased control over their own resources. Pilot Schools are granted five key areas of autonomy: 1) staffing; 2) budget; 3) curriculum and assessment; 4) governance; and 5) schedule. These areas of autonomy allow the schools flexibility in making decisions that best meet the needs of students and their families.

- **Accountability.** Pilot Schools are held to higher levels of accountability in exchange for increased autonomy. In addition to ongoing assessments, every five years each Pilot School undertakes a School Quality Review process based on a set of common benchmarks for a high-performing school.

- **Small Size.** Pilot Schools are small in size in order to facilitate students and adults knowing each other well. Only 2 of the 20 Pilot Schools enroll more than 450 students, and both of these schools are divided into multiple small academies. Pilot Schools work to create nurturing environments in which staff attend to the learning needs of all students.

- **Commitment to Equity.** Pilot Schools are not selective and strive to enroll students representative of the larger district. Each Pilot School has developed a vision and mission around how to educate students, which includes the belief that every student is able to achieve academic success, regardless of his or her background. Pilot Schools are committed to continually examining student data to ensure that all students are served well.

### Boston Pilot Schools, SY 06–07

<table>
<thead>
<tr>
<th>School Name</th>
<th>Grades Served</th>
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<tbody>
<tr>
<td><strong>Elementary</strong></td>
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<tr>
<td>Baldwin Early Learning Center</td>
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<tr>
<td>Thomas Gardner Elementary School</td>
<td>K0 to 5</td>
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<td>Lee Academy</td>
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<td>Samuel Mason School</td>
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<td><strong>Elementary-Middle</strong></td>
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<td>Lyndon Elementary School</td>
<td>K to 8</td>
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<td>Mission Hill School</td>
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<td>Orchard Gardens Pilot School</td>
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<td>Young Achievers Science and Mathematics Pilot School</td>
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<td><strong>Middle</strong></td>
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<td>Lilla G. Frederick Pilot Middle School (formerly New Boston Pilot Middle School)</td>
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<td>The Harbor School</td>
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<td><strong>Middle-High</strong></td>
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<td>Josiah Quincy Upper School</td>
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<td><strong>High</strong></td>
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<td>Another Course to College</td>
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<td>Boston Arts Academy</td>
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<td>Boston Community Leadership Academy</td>
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<td>Boston Day and Evening Academy (Horace Mann Charter)</td>
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<tr>
<td>Fenway High School</td>
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<td>Greater Egleston Community High School</td>
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<td>Health Careers Academy (Horace Mann Charter)</td>
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<td>New Mission</td>
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<td>Tech Boston Academy</td>
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Strong, shared leadership and governance enable Pilot Schools to achieve their missions and create high-performing schools.

I: Building a Framework

Leadership: The people closest to the students make school and policy decisions, including teachers, administrators, support staff, families, community partners, and students themselves. Governing boards have increased decision-making power over the school’s mission, budget approval, principal selection and evaluation, and policies.

—Principles and Practices of the Pilot Schools Network

Shared Leadership in Pilot Schools

Strong, shared leadership and governance enable Pilot Schools to achieve their missions and create high-performing schools. Research is clear on the important link between leadership and student achievement, particularly as leadership shapes teaching and learning.¹ When members of a school community are empowered to make decisions, a school culture becomes more collaborative. From staff to administrators, parents to community members, and with students always at the center, the “we” is automatic. As Rob Bustamante, a Harbor School student support staff member described, “Because we’re a Pilot School, we have a say,” and, “We figure decisions out together.”²

Decisions are made by those closest to the students in Pilot Schools due to their small size and autonomy. In small schools, staff share leadership responsibilities with principals.³ The Pilot School areas of autonomy—staffing, budget, curriculum and assessment, governance, and schedule—allow each school community to structure itself according to students’ needs. Staffing autonomy ensures that Pilot School staff are committed to
the work they are doing; all staff voluntarily choose to work in a Pilot School. Budget and schedule decisions are decided at the school level, with staff input and decision making and governing board approval. With increased school-level decision-making power, there is increased responsibility for each decision that is made. CCE coaches work with schools to develop leadership at all levels, including administrative, staff, student, family, and community.

Setting a mission first enables Pilot Schools to guide their efforts for building a successful school. High expectations and equity for all students are the focus. Once the mission is set, the five areas of autonomy are used to fulfill each school’s unique mission. The school community in both start-up and conversion schools sets the mission through a collaborative process that is revisited and revised on a regular basis. The governing board, along with the entire school community, is responsible for keeping the mission at the center of the school’s work, using it to set measurable goals, and for analyzing progress based on multiple indicators.

As leadership roles are transformed and a mission is set, a strong professional collaborative culture is essential in Pilot Schools. Through autonomy, schools form creative staffing patterns and schedule time for staff to meet to set goals for improving teaching and learning. They implement strategies such as analyzing student work and performance. Staff and administrators work closely together in teams and committees, utilizing their strengths to achieve the school’s mission. Pilot School decision-making teams include leadership teams, interdisciplinary teams, content-based teams, grade-level teams, and full faculty. Strategies and tools for organizing meetings are utilized as groups work together.

Governing boards, a structure created through governance autonomy, represent the voices of an entire Pilot School community. Decision making and leadership are shared among staff, administrators, families, community members, and, for high schools and some middle schools, students. Governing boards operate with expanded powers in the place of traditional district- and state-mandated school site councils. Boards are responsible for setting and maintaining the school mission; hiring, supervising, and evaluating the principal; approving the budget; and approving election-to-work agreements.

Like governing boards, election-to-work agreements are a structure of shared accountability in Pilot Schools. These agreements serve as the staff’s contract with a school in place of the district’s teachers union contract—except for seniority, salary, and benefits (which are set at the district level).* Governing boards approve the annual agreements. Election-to-work agreements are crafted to create the conditions that enable a Pilot School to achieve its mission. Staff sign the agreement

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* Election-to-work agreements apply only to teachers union members.
based on the fit of the school’s beliefs, practices, and structures with their own.

In the following chapters the leadership and governance framework of Pilot Schools will be outlined in greater depth, including leadership roles, setting a mission, professional collaboration, governing boards, and election-to-work agreements.
Staffing: Pilot Schools have the freedom to hire and release their staff in order to create a unified school community. Staff should play a significant role in hiring. Pilot Schools:

- Decide on the staffing patterns and work assignments that create the optimal learning environment for students.
- Hire staff who best fit the needs of the school, regardless of an individual’s current status—member of the district or not. Every teacher hired becomes a member of the teachers union bargaining unit.

Budget: Pilot Schools have a lump sum per pupil budget that allows the school to decide on spending that provides needed programs and services to students and their families. Pilot Schools:

- Have a lump sum per pupil budget, the sum of which is equivalent to the per pupil budget of other district schools within the same grade span and includes salaries, instructional materials, consultants, and more.
- Choose either to purchase identified discretionary district services or to not purchase them and include the per pupil cost in the school’s lump sum per pupil budget.

Curriculum and Assessment: Pilot Schools have freedom to structure their curriculum and assessment practices to meet students’ learning needs. While all Pilot Schools are held accountable to federal- and state-required tests, these schools are given the flexibility to determine the school-based curriculum and assessment practices that best prepare students for federal and state assessments. Pilot Schools:

- Are freed from local district curriculum requirements—they can choose what content to cover and how to cover it.
- Set their own promotion and graduation requirements, although they must be comparable in rigor to the district requirements. Pilot Schools have an emphasis on competency-based, performance-based assessments.
- Decide on the professional development in which faculty engage.

Governance: Pilot Schools have the freedom to create their own governance structures, while being mindful of state requirements, including standardized tests and school councils. Pilot Schools:

- Establish governing boards to:
  - Set and maintain the school mission.
  - Select, supervise, and evaluate the principal, with final approval by the superintendent in all cases.
  - Approve the budget and election-to-work agreement.
- Set policies that the school community feels will help students to be successful.

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Schedule: Pilot Schools have the freedom to set longer school days and calendar years for both students and faculty in accordance with their principles or school reform models. In particular, research supports a correlation between increased faculty planning time spent on teaching and learning and increased student achievement. Scheduling that allows for summer and school-year faculty planning time contributes to a more unified school community and education program. Pilot Schools:

• Increase planning and professional development time for faculty.
• Organize the school schedule in ways that maximize learning time for students.
The Pilot Schools Network vision and mission statements and principles and practices were developed by Pilot Schools Network leaders.* Revisions have occurred over time, with the core ideas remaining the same.

**Vision Statement**

The Pilot Schools Network envisions education as a way to achieve a more just, democratic, and equitable society. Pilot Schools engage their students in rigorous and meaningful learning experiences. We aim to prepare students to become thoughtful and reflective individuals who construct and apply knowledge. The Network believes that a primary purpose of education is to empower all students to succeed in higher education and to contribute to their communities.

**Mission Statement**

The Pilot Schools Network engages in:

- **Leadership development** for governing boards, directors, staff, students, and families, with a focus on creating democratic and shared decision-making governance models;
- **Shared accountability** to assist schools in assessing progress and in developing models of authentic assessment for both students and staff;
- **Advocacy** that includes work with the district and public to ensure support and resources for Pilot Schools;
- **Community organizing** to broaden the constituency of the Pilot Schools and strengthen our collective voice and support.

**Principles and Practices**

**Unifying Vision and Mission:** Each school has a unifying vision and/or mission that is reflected in all school practices and structures, including curriculum, policies, schedule, professional development, and family engagement.

**Equity:** Patterns of achievement across race/ethnicity, gender, language, disabilities, and socioeconomic status are examined in order to allow schools to become inclusive communities and identify practices that provide all students opportunities to reach high levels of achievement.

* This statement was created by the Boston Pilot Schools Network and has been adapted to apply to Pilot Schools in other districts.
Curriculum, Instruction, and Assessment:

- High expectations are explicit for every member of the school community.
- Student learning is purposeful. Teachers empower students to be responsible for their learning, thereby increasing student engagement.
- Instruction is differentiated. Students use creative problem solving and active use of knowledge.
- A rigorous core academic curriculum is provided to all students.
- Assessment occurs in multiple ways, including exhibitions and portfolios, in addition to standardized tests. Students are expected to demonstrate their knowledge and understanding of key competencies and their relevance to the world.

A Commitment to Small Size: Optimal school size is no more than 450 students. Small schools enable teachers and students to build strong relationships and a safe environment.

Professional Collaborative Culture: Teachers share their practice and work in teams in order to build and sustain a professional collaborative culture. Schools place an emphasis on shared decision making and shared responsibility for student achievement.

Leadership: The people closest to the students make school and policy decisions, including teachers, administrators, support staff, families, community partners, and students themselves. Governing boards have increased decision-making power over the school’s mission, budget approval, principal selection and evaluation, and policies.

Family and Community Engagement: Relationships are focused on respect, trust, and collaboration. Families are encouraged to participate as partners in each school. Schools form partnerships with community organizations in order to expand learning opportunities and support services for students and their families.
Pilot Schools define leadership roles differently than they are typically defined in other schools. Autonomy creates both possibilities and questions as Pilot Schools have the power to choose how to allocate their resources in the service of teaching and learning. Small size requires teachers to engage in a variety of leadership roles. School-based governance, including governing boards and election-to-work agreements, creates opportunities for students, families, and community members to participate much more actively in the leadership of the school. Les Edinson, principal of the conversion school Fitchburg Arts Academy, explained, “It [Pilot status] gives us a great deal of autonomy. The people who are closest to kids can make decisions that affect the kids.”

In Pilot Schools, principals play a critical and complex role in helping their schools to best utilize autonomy over resources to strengthen teaching and learning. The following vignette’s in-depth focus on one principal’s practice illustrates the challenges and opportunities of leadership in a Pilot School. It underscores the collaborative nature of leadership in a Pilot School, where a principal must draw upon the voices and skills of staff, parents, community members, and students.
One Principal’s Perspective on Leadership

When Peggy Kemp first became principal of Fenway High School, a founding Pilot School in Boston, she knew the role would be different from her past positions. She had served on the board of a Pilot School and was steeped in the language and ideas of school reform. Nevertheless, she found that the first year was a challenge: “The first year, there was quite a learning curve for me to understand how the teams worked, how people viewed their roles on the teams, how I communicated this to an outside audience, and how I defined my role.”

Prior to coming to Fenway, Kemp had served as interim principal at the John D. O’Bryant High School of Science and Mathematics, a district exam school of over 1,000 students. In that position, she supervised an extensive administrative staff to whom she could delegate many of the day-to-day responsibilities of managing the school. “My primary role at that school was thinking about the direction the school needed to go in, developing that vision, and implementing change.” Yet the possibilities for change were constrained by budget and staffing limitations. Kemp’s experience working for several school reform organizations, as well as for the Harvard University Graduate School of Education, had allowed her to talk extensively with principals from all over the country. She discovered a common thread to her conversations: “I got the sense frequently from those principals that they felt there was not a lot they could do to change. They felt really constricted by mandates. They could only do so much within the confines of the district.”

Fenway represented a major change from the standard approach to education. “I found a different sort of energy. People did feel control over what they were doing, and that they could make change. You have a faculty that is very receptive to thinking about doing things differently. They don’t define their roles in terms of district mandates or union rules. That in itself was a very different experience.”

Right away she found herself immersed in the daily operations of the school. Without an extensive administrative structure, teachers took on a level of honesty and willingness to expose oneself to critique is required in situations of true shared leadership.

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variety of leadership roles, but their primary role, of course, was to teach. So the principal had to be very involved. “It was an adjustment, but it changes your relationship with teachers and with students. You interact with students much more frequently and for a variety of reasons because there’s not a layer that separates you.”

Working with Teachers: Shared Leadership

Kemp found that her relationship with teachers was stretched beyond supervision. “There are so many different leadership teams, and I’m just a member. I’m responsible and accountable for how the school functions ultimately, but I’m a member of the team where everyone feels they have an equal voice.” Learning how to balance the accountability and responsibility of her role with the collaboration of shared leadership was something Kemp worked on deliberately. One example has been her work with the Teaching and Learning Committee at Fenway. The committee is a group of faculty that meets every other week to design and implement the professional development focus for the year, after having surveyed the faculty to identify priorities. They have been engaged in this process for planning professional development for the past four to five years. “I think that I come to the committee as a contributing member like everyone else,” Kemp said.

At the same time, her role as headmaster required that she bring a critical eye to the process through a set of probing questions: “As a committee we do make a decision together, but then once the decision has been made, these other questions arise, because they recognize that I have to be accountable to a wider group. They ask, ‘Are you comfortable with this?’”

The questions might be financial or focused on the allocation of time. “Can we take the time to do this? Is there money for this?” She gave an example of a critical moment that grew out of the school’s focus on issues of gender and sexual orientation. “There was a really full discussion. We were going to have a play presented, Queer 101, for our opening day exercise for all students. When we actually got down to making the decision, I raised the question, ‘Is this wise timing? We’ve addressed these issues with our other students but not with the freshmen. How will parents react? How will the rest of the faculty?’ So those were issues that I had to address and I ultimately had to be accountable for if I endorsed what was happening.”

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After reviewing these questions with the Lead Team and developing a plan for the day, they did present the play as the opening activity for the school year. “It was the right decision and a very enlightening lesson for us all.”

“I’ve worked out this dynamic of decision making with the committee, because if they’re going to invest in planning and work, they’ve got to do it with the belief that their time is valued, their ideas are valued and we’re going to follow through on it.”

A level of honesty and willingness to expose oneself to critique is required in situations of true shared leadership. Recently the committee tackled an aspect of Kemp’s role as principal—teacher supervision. “They value observation in the classroom. And there is an ongoing feeling that I’m not doing enough of that. There’s still a push that I should do more, but an acceptance that there are other things that get in the way so that I’m not in the classrooms all the time.”

To ensure that all faculty receive feedback regarding their teaching practice, the committee designed a peer observation structure. “All of us are assigned to groups where we’ll make at least three observations and we’ll have time to debrief. They’ve come up with a schedule, the groupings, and they’ll see that it’s implemented. Now the question back to me is, ‘Is it ok if we use planning time for observations, or some of the meeting time for debriefing?’”

The idea and practice of shared leadership is so pervasive at Fenway that it leads to the development of new leaders and new initiatives all the time. “Teachers take responsibility over running their team meetings. It’s not an administrator running them. It’s a teacher who has the same responsibilities as everyone else, but who is also the chair. In two of our departments, we have teachers who are entering their fifth year. They served as interns at Fenway and now they’re chairs of their department. They are doing workshops in other venues—one is also a humanities coach for the BPS Office of High School Renewal in the smaller high schools. Our humanities team took on the idea of mentoring humanities teachers in the new small high schools, and developed a mentoring plan for how to share resources—they felt so confident about their program and their discipline.”

(continued)
One Principal’s Perspective on Leadership (continued)

**Working with the Budget**

There is no doubt that the control Pilot Schools have over their time and resources makes a critical difference. As Kemp pointed out, it is all interconnected: “Teachers feel a lot of ownership over their profession in a Pilot School. It’s all connected back to autonomy. We really can change things. We can reshape the way we’re doing things to best benefit what we want to accomplish. Having control over those dollars and how they’re allocated allows you a sense of freedom to define the educational experience the way all of us think it best should be defined.”

The price of such freedom is complexity, pressure, and time. “I like having it, but it requires a lot of work, a lot more work than in a district school where there’s not much flexibility about the budget. The budget issue requires me to think about personnel, staffing assignments, how I can deliver a service in the most cost-effective way, looking at collaborations that might bring in extra resources and reduce our expenditures. Once you step into a Pilot School, you’re hit with this idea that this is an enterprise where I have to think about all the services we want to provide and how I’m going to fund them.”

For Kemp the benefits of budget autonomy are clear. “You really can shift teaching assignments around. You really can think about what people should be doing rather than being just told by the district, ‘You’re a high school, so you need two chemistry teachers.’ We can even consider, ‘Are we going to teach chemistry? Who do we need?’ You see the organization more as something that can really be shaped if you identify the right resources and think creatively about how you’re aligning those resources.”

**Working with the Board**

Governing boards are another unique feature of Pilot Schools. Because of the school’s autonomy, the governing board has a much greater scope of responsibility than does a regular school council. Pilot School boards are made up of families, staff, community members, and students (for high schools and some middle schools).

“Because the board of trustees [Fenway’s governing board] selects and evaluates the headmaster, I think they take their responsibilities more seriously. The trustees at a Pilot School feel that they are accountable for the success of the school. They are very much invested in how the school...”
is doing long range. My annual evaluation is fairly comprehensive. Parent, faculty, and student input is sought. The trustees are there at our meetings—we don’t have a lot of absentees. They ask good questions. I’m held accountable in a way that’s different. I really have to be prepared. I have to give my report and be prepared to address the issues that come up.”

Fenway’s strength in shared leadership and governance has most recently led to a comprehensive strategic planning process. “We used a ‘big tent approach’ that involved around 100 people—students, teachers, alumni, our board, community members—and identified key areas that we want to focus on going forward. Now our faculty has divided up into committees, and they are making recommendations on how we implement this process. For example, we have a curriculum review team, an electives team, and a team that’s dealing with college awareness. They approach it with a sense of responsibility and they’ll make it happen.”

**Student Voice at Fenway**

Students are involved in leadership activities in Fenway through formal structures like the student government and representation on the board, but student voice and leadership really begin in the classroom and are tied closely with the learning process at Fenway. “There’s a heavy emphasis on reflection in the classroom, what you’re learning for the portfolio process and for the exhibition.” Students are required to think critically and must be able to articulate their own opinions. This kind of intellectual leadership shapes the culture at Fenway, and students are frequently asked to use their leadership skills with outside visitors. “We have so many exhibitions that bring in outside judges, and we have many visitors to the school.” As part of any school visit, visitors meet with a group of students and ask them a range of questions. “Students reflect on their experience at the school and they develop clear opinions. Sometimes the visitors think that we must have our highest achieving students there, but many times they’re not. We use a wide variety of students. But they are all so reflective.”

Given the complexity and the challenge of her role, what would Kemp say to someone thinking of taking on the role of Pilot School principal? “It’s only for people who really want to be immersed in the learning experience and in the community. It’s not for somebody who wants to manage. What’s most rewarding is that there really is a community here.
One Principal’s Perspective on Leadership (continued)

There’s an opportunity for me to know teachers and students on a very personal level, for me to observe their growth, to know their personal issues. I like the idea of change. I don’t want things to be too static. There’s an opportunity to be continually evolving and reassessing. What’s the best direction that we should be moving in? What are we doing well? What can we do better? And yes, we can find a way to make it better if we all work together.”
The Role of the Principal

The importance of viewing the principal as a leader among leaders has been well documented:

In successful schools, principals aren’t threatened by the wisdom of others; instead they cherish it by distributing leadership. The principal of a successful school is not the instructional leader but the educational leader who mobilizes the expertise, talent, and care of others. He or she is the person who symbolizes, supports, distributes, and coordinates the work of the teacher as instructional leader.²

Pilot School principals are able to take shared leadership further because autonomy gives them the tools to shape staff roles and allocate time for meetings and professional development. Peggy Kemp, principal of Fenway High School, speaks to the delicate balance of this role as she considers herself “just a member” of the Teaching and Learning committee, but a member with additional accountability. With autonomy, Pilot School principals have a greater voice in decisions on their school’s budget, staffing, curriculum and assessment, and schedule. Rather than the principal’s taking on these decisions alone, schools create structures for staff input. For example, at the Harbor School a Planning and Management team exists to “figure out the budget and election-to-work agreement together” in a “very open process” that is representative of both staff and administration, according to a staff member.³

Different configurations of the role of the principal are common in Pilot Schools. Several schools currently or in the past have developed a co-principal model, where two or more principals lead a school. Mission Hill, a school of only 150 students, is a “staff-run” school, as described by teacher and Pilot School Staff Network member Ann Ruggiero. Mission Hill’s core faculty is responsible for all major curriculum, staffing, and scheduling decisions. The faculty consists of a principal, one administrative assistant, and 11 classroom teachers. All staff are involved in weekly meetings to make and review decisions together.⁴

Pilot School principals:

• Keep the school’s mission at the forefront of all decisions and practices, using the mission to guide the development of goals.

• Work closely with the governing board to ensure the school stays on track with its mission and goals.

• Lead the effort to create a budget, schedule, and staffing pattern that best serves teaching and learning.
Ensure a focus on high academic expectations, challenging curriculum, effective instruction, and support for all students.

Ensure the financial well-being of the school, including responsibility for fundraising.

Mobilize and support teacher leadership through a team and committee structure.

Build strong relationships with teachers, students, families, and community members, and immerse themselves in the daily life of the school.

The Role of Staff

Beginning with creating and negotiating the work conditions of their schools, Pilot School staff feel a high degree of ownership and responsibility. Autonomy over curriculum and schedule creates both the necessity and opportunity for staff to exercise real leadership in their classrooms. The expectation and structure of professional collaboration provide support for such instructional leadership. Beyond the classroom, Pilot School staff take on a variety of leadership roles—including teams and committees—to ensure that the school fulfills its mission. As illustrated in the vignette, Fenway teachers engage in a wide range of leadership activities and structures, from leadership committees to discipline-based teams. Budget and staffing autonomy allows for the creation of new roles, such as team chairs. In Pilot Schools the conditions exist to make such leadership a reality. Pilot School staff:

Choose and create curriculum and instructional practices that best meet the needs of their students. Pilot School teachers, while still accountable to state standards, have the autonomy to determine the best path to reach standards.

Collaborate with colleagues to assess student learning and improve curriculum and instruction. Autonomy over schedule allows sufficient time for professional collaboration.

Take on a variety of leadership roles on committees, teams, and in the wider Pilot Schools Network to support the continuous improvement of teaching and learning and sharing of best practices.
Preparing Pilot School Leaders

Being a Pilot School principal or a teacher-leader requires a particular set of skills, which led to the development of a different kind of leadership preparation program. The Greater Boston Principal Residency Network (PRN)* is an apprenticeship-based program developed by the Center for Collaborative Education and Northeastern University. Through the program, participants, also known as “aspiring principals,” complete projects and handle challenges that they will encounter as principals. They do so while paired with a “mentor principal” who has distinguished him/herself in the leadership of a small school. Many graduates have gone on to serve as principals, and some have assumed teacher-leader roles. PRN has utilized the experience of existing Pilot School leaders to train new ones.

The Role of Students

Pilot Schools are committed to creating personal, supportive learning environments for their students. Like the students in the Fenway vignette, Pilot School students often serve as guides to visitors and spokespeople about the value of the Pilot approach.

A study of four Pilot high schools examined the written reflections of prospective students and interviewed current students. The study found consistent themes across schools:

- Particularly striking were the high expectations that students had for both their schools and themselves.... Students also wrote about the support they needed to be successful — safe environments, smaller schools and class size, and the chance to get to know students and teachers well.

Pilot School students:

- Hold high expectations for themselves and their schools.
- Take responsibility for their learning, demonstrate it, and reflect on it.
- Exercise leadership in such structures as governing boards, student councils, and in daily school life.

The Role of Families

Research is clear on the benefit of engaging families in schools on multiple levels — from the support of learning to participation in school governance. When parents are engaged in their children’s education, their children do better academically and socially. Pilot School governing

* For more information on the Greater Boston Principal Residency Network (PRN), visit: http://www.cce.org/gbprn/
boards include family representatives, and other forums for family leadership exist, including parent organizations. For example, the Baldwin Early Learning Center has both a School Parent Council (SPC) and “Room Parents.” The SPC is comprised of parents and families and serves as “a forum for parents to voice their ideas, opinions, and concerns.” Room Parents represent each classroom on the SPC and “act as liaisons among the classroom, the parents, and the principal.”*

Because families choose a Pilot School for their children, they feel a special sense of ownership and responsibility for the school. As Grace Sanchez, parent of a student at Lilla Frederick explained, “They [staff and administration] help me understand that I have a voice.”

Many Pilot Schools grew directly out of family and community advocacy for high-quality, community-centered schools, such as Greater Egleston Community High School. A coalition of community organizations, including tenant groups, neighborhood and business associations, churches, and the local community development corporation advocated to convert the alternative high school program into a Pilot School.

The Role of Community Members

Because of the specific mission of Pilot Schools, their small, personalized nature, and the structure of their governing boards, community involvement tends to go beyond what is typical in most schools. Community members involved in Pilot Schools engage in advocacy, fundraising, and volunteer activities. Many Pilot Schools have formal partnerships with community, business, and higher education organizations, and make internships a formal part of their curriculum.

Pilot Schools engage in building partnerships and leveraging resources for their schools. In some schools, governing boards and separate 501(c)(3) organizations support principals with these tasks. The Mason Pilot Elementary School has formed partnerships with local businesses, foundations, and nonprofits to increase the school’s budget and provide students with: a new computer lab, science education starting in prekindergarten, swimming, after-school programs, and music, art, and dance instruction. The before- and after-school programs allow students to be at school from 7:30 a.m. to 6:00 p.m. “We’re a full-service school,” stated Principal Janet Palmer-Owens.

* For more information on parental involvement at the Baldwin Early Learning Center, visit: http://www.boston.k12.ma.us/baldwinelc/parents.htm
Developing Shared Leadership with the Support of a Coach

The following vignette describes the role of a coach in developing shared leadership and provides one example from TechBoston Academy (TBA). Amy Bayer, CCE coach, worked with faculty members at TBA to create an effective process for creating staff development with teachers’ input and investment.

The term “shared leadership” can sound like a contradiction in terms. Our traditional images of leadership most often reflect strong individuals acting alone to motivate followers. Shared leadership is harder to capture in a story or an image, but ultimately, it can produce more sustainable results. What gets in the way of shared leadership in schools is the perception that it is cumbersome or inefficient— that it will slow down the pace of change to get input and foster involvement across a school’s community. The perspective offered by an outside coach can often help a school establish shared leadership practices.

CCE coaches assist Pilot School leaders to establish structures and routines for faculty and governing board meetings and professional development sessions that encourage shared leadership. Rotating facilitation of meetings, soliciting input on agendas, and communicating through shared minutes are all concrete ways to make shared leadership efficient and productive.

Amy Bayer, CCE coach, worked with the leadership team and faculty senate representatives at TBA to construct the agendas for a series of faculty retreats. Coming in the spring of the school year, the retreat days provide a significant opportunity for professional development and planning. As Principal Mary Skipper put it, “The goal of the retreat is that everyone has a chance to co-create the vision of the school.” Teacher Stephen Ensdorf reflected that for the most part the retreats work well. “It takes a lot of planning—if it’s not planned properly, it falls flat.” He especially likes the opportunity to choose working groups that are of particular interest, such as new technology or student discipline. “It allows people’s interests and expertise to be valued.”

(continued)
Developing Shared Leadership with the Support of a Coach (continued)

Making sure that everyone’s voice is heard is a critical part of shared leadership, according to Keith Love, TBA’s director of student leadership and operations. “It’s so important to get input from people with different styles — and reach the more quiet person in the back as well as the person who always speaks up.” He believes that the role of the coach has been helpful in the planning process: “It’s important to include someone who knows the community but isn’t in it day to day.”

For Skipper and Love, shared leadership is the critical factor in moving a school from great ideas to action. “It’s not just what, but how,” said Love. “As administrators, we couldn’t do it on our own.” Skipper said that shared leadership is just not negotiable anymore. “Change is very people dependent, and if it only happens at one level of the organization, it doesn’t happen. In education we are all shareholders.”
Governance Structures at TechBoston Academy

In addition to the annual retreat, TechBoston Academy works to create opportunities for shared leadership throughout the year in its governance structures.

<table>
<thead>
<tr>
<th>Structure</th>
<th>Members</th>
<th>Meeting Times</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Governing Board</td>
<td>TBA community: administrators, teachers (including the teachers union representative), parents, students, representatives from education organizations, city government, the district, the community, businesses, and foundations.</td>
<td>Monthly.</td>
<td>To maintain the TBA mission and review progress indicators; to evaluate the headmaster; to approve the election-to-work agreement; to approve the budget; to establish policies.</td>
</tr>
<tr>
<td>Advisory Council</td>
<td>Representatives from colleges and universities, state government, the district, businesses, and foundations.</td>
<td>Two to three times per year. Joint meetings with governing board.</td>
<td>To assist with TBA outreach to other schools, businesses, and foundations. To serve as a network of supporters with links to key community, education, and business groups. To serve as a group willing to provide feedback, advice, and encouragement to the school.</td>
</tr>
<tr>
<td>Friends of TBA</td>
<td>Forming.</td>
<td>Forming.</td>
<td>To raise funds for TBA scholarships, supplies, and resources.</td>
</tr>
<tr>
<td>Faculty Senate</td>
<td>Open to all faculty.</td>
<td>Every other week.</td>
<td>To make decisions on school initiatives; to hold joint meetings with administrative team.</td>
</tr>
<tr>
<td>Administrative Team</td>
<td>Headmaster, Director of Student Leadership and Operations, Director of Curriculum and Technology.</td>
<td>Twice weekly.</td>
<td>To communicate about school issues. Faculty are represented at one of the twice weekly meetings.</td>
</tr>
<tr>
<td>Student Council</td>
<td>All students.</td>
<td>Every other week.</td>
<td>To develop and plan school activities.</td>
</tr>
<tr>
<td>Parent Council</td>
<td>All parents, families, and guardians.</td>
<td>Monthly.</td>
<td>To provide direction in terms of the needs of his/her child and make recommendations to the governing board, faculty, and administration.</td>
</tr>
</tbody>
</table>
Lilla G. Frederick Pilot Middle School works to create shared decision making through its teams and committees.

### Decision-Making Teams at Lilla G. Frederick Pilot Middle School

<table>
<thead>
<tr>
<th>Team</th>
<th>Members</th>
<th>Purpose</th>
<th>Meetings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Governing Board</td>
<td>Five parents, four teachers, six community members, and two administrators.</td>
<td>To review and approve policy and the budget.</td>
<td>Monthly.</td>
</tr>
<tr>
<td>Content Area Teams</td>
<td>Teachers from humanities, math, science, electives, English language learners, special education, and social workers. Work is led by current teachers who have accepted the position of lead facilitator.</td>
<td>To have conversations and make decisions regarding teaching and learning.</td>
<td>Twice per month.</td>
</tr>
<tr>
<td>Project Implementation Team</td>
<td>A group of teachers: two per academy and one whole-building electives teacher.</td>
<td>To support the integration of technology into the curriculum.</td>
<td>Two to three times per month.</td>
</tr>
<tr>
<td>Data Team</td>
<td>Administrative team and one teacher per academy.</td>
<td>To disaggregate and disseminate data to teachers.</td>
<td>Monthly.</td>
</tr>
<tr>
<td>Academy Level Teams</td>
<td>All teachers from each of the four academies.</td>
<td>To work together to support teaching and learning.</td>
<td>Weekly.</td>
</tr>
<tr>
<td>Parent Council</td>
<td>Parents, families, and guardians of students.</td>
<td>To recommend school policies to the governing board and create and implement programming and parent events.</td>
<td>Monthly.</td>
</tr>
<tr>
<td>Administrative Team</td>
<td>Principal and academy leaders.</td>
<td>To engage in professional development on being an effective leader.</td>
<td>Weekly.</td>
</tr>
</tbody>
</table>

(continued)
### Decision-Making Teams and Committees: Lilla G. Frederick Pilot Middle School (continued)

<table>
<thead>
<tr>
<th>Committee</th>
<th>Members</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Election-to-Work Agreement</em></td>
<td>Union representatives and governing board teacher representatives.</td>
<td>To create a mutually acceptable election-to-work agreement that is shared with staff and then taken to the governing board for final approval.</td>
</tr>
<tr>
<td><em>Budget</em></td>
<td>Administrators, teachers, governing board.</td>
<td>To gather input from administrators and teachers, and create a plan with the administrative team and budget technician based on the information collected, and then to take it to the governing board for final approval.</td>
</tr>
<tr>
<td><em>Hiring</em></td>
<td>Team of teachers, administrators, parents, students, and community members.</td>
<td>To select the best possible candidates from the perspectives of all members of the school community.</td>
</tr>
<tr>
<td><em>Academy Schedule</em></td>
<td>Academy staff.</td>
<td>To create a schedule that best fits the needs of students within each academy.</td>
</tr>
</tbody>
</table>
At every Pilot School we went to, students could articulate the mission and vision of their schools.

—Teacher and design team member, BPS school exploring Pilot School status

3: School Mission and Vision

A clear mission and vision unifies a Pilot School community around the school’s purpose and direction. It provides the school with a guide in making decisions that affect day-to-day activities and long-term goals. “You must have a vision to be a Pilot School,” stated Nicole Bahnam, principal of Boston Community Leadership Academy. Ensuring that the mission is created and owned by all is the first and most critical role of a principal, and becomes the responsibility of the entire school community. Through autonomy, Pilot School staff have the opportunity to shape their school in order to meet their school’s mission. Setting a mission or vision is a process that begins with the inception of Pilot status, whether as a start-up or conversion, and continues on a regular basis with input from multiple constituents.

Pilot School design teams first begin to develop a mission with staff input as they collectively decide what they envision for the Pilot School. Design teams may include staff, administrators, families, community members, and students. In one school thinking of converting to Pilot status, the design team formed a “vision” subcommittee, which brought a proposal to the whole design team, the whole faculty, and to grade-level teams for feedback. The vision subcommittee conducted student focus group interviews to gain input because, “At every Pilot School we went to, students could articulate the mission and vision of their schools.”

Once in operation, governing boards replace design teams as the
Definitions of “Mission” and “Vision”

The following definitions of “mission” and “vision” are adapted from the Boston Arts Academy, “Pilot School Governing Board Development” session. Although there are distinct definitions, often the terms have been used interchangeably.

**Mission:** A clear mission statement defines the school’s “reason to be” and is the source from which all school plans should grow. It is the main tool for defining your school to the outside world, including potential students, parents, funders, and board members.

**Vision:** A vision statement is a vivid idealized description of a desired outcome(s) that inspires, energizes, and helps create a mental picture of what success looks like for your organization over 10 or 20 years.

Policy-decision-making body for Pilot Schools. It is governing boards that are ultimately responsible for setting and maintaining a school’s mission by gaining feedback from the school community and analyzing data for evidence of progress.

Pilot Schools were created to be high-performing and equitable schools. They aim to address the needs of all members of the school community. The Lee Academy’s mission statement shows that those needs can relate to both students and staff:

Our mission is to ensure the healthy, full development of the whole child by building academic skills, social/emotional competencies, and effective habits of being. We support the whole development of our children by bringing together a caring and engaged community of adults. We support staff by being a staff-centered school—a school committed to fostering and tending to the collegiality, professional growth, intellectual exploration, leadership development, and the emotional well-being of our staff. Further, we strive to develop authentic relationships with families, engaging them as co-teachers in their children’s learning environment.*

The mission is the foundation on which Pilot School areas of autonomy are built. For some conversion schools, becoming a Pilot School means the opportunity to deepen their existing mission through autonomy. As principal of the conversion school Mason Pilot Elementary School, Janet Palmer-Owens frequently heard the question, “Why turn Pilot?” She responded simply, “To take our school to another level.” Similarly, Abby Brown, a teacher at the Gardner Elementary School, another conversion school, stated, “Pilot status gives a school the freedom to ask, ‘What are we actually doing and what do we need to change?’”

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* For a list of all Pilot School mission statements, see The Essential Guide to Pilot Schools: Overview, Center for Collaborative Education, September 2006, or visit http://www.cce.org/pilotguides/
Other conversion Pilot Schools significantly changed their mission with Pilot status. At Boston Community Leadership Academy, Pilot status initiated a shift from a work-study to a college-preparatory focus, which led to great changes in the school’s leadership roles, curriculum and instruction, and schedule. Now the school aims to have every student enroll and succeed in college. One student explained:

I like the idea of this school being a college prep school. We have a lot more discussions in the classroom, and the teachers are involving every student. So, it’s just growing every year, I think, into something good.\(^5\)

Several Pilot Schools are affiliated with the Coalition of Essential Schools (CES), a national school reform organization that emphasizes “personalized, equitable, and intellectually challenging schools.”\(^6\) The "Principles and Practices" of the Pilot Schools Network is reflective of the CES principles.*

At Boston Day and Evening Academy (BDEA), a CES school, the mission and vision focuses on providing students who are over-age for grade level and at high risk for dropping out with a successful competency-based education that prepares them for further education and/or careers.\(^7\) The school used its vision to develop a five-year strategic plan with a timeline and budget that describes the school’s long-term goals and action steps for: 1) curriculum, 2) student support, 3) institutional advancement, and 4) institutional growth.\(^7\) This is one example of how Pilot Schools translate their missions into concrete goals and action plans for improving student achievement.

A mission not only affects the practices of the school, but also influences who chooses to attend. Students and families seek out Pilot Schools for their unique approaches to education. For example, the mission at Health Careers Academy (HCA) includes supporting students pursuing higher education and health care careers. A current HCA student explained:

If you want to be focused and go directly to college, go here. All the classes are focused on that. Like here, we get a second language from freshman year, we’re taking AP [Advanced Placement] classes if you pass certain tests...everything is just college based.\(^8\)

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* For more information about the Coalition of Essential Schools, including the Common Principles, visit: http://www.essentialschools.org/pub/ces_docs/about/about.html

† For Boston Day and Evening Academy’s mission, vision, and strategic plan, visit: http://www.bacademy.org/aboutbdeamission.htm

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"People want to come here because of the mission. That’s why I want to work here."

—Bruce Pontbriand, teacher, TechBoston Academy
Like students and families, staff and administrators seek out Pilot Schools for their particular missions and practices. According to Bruce Pontbriand, a teacher and governing board member at TechBoston Academy, “People want to come here because of the mission. That’s why I want to work here.” Pilot School missions form the basis of election-to-work agreements, the school-based contracts for Pilot School staff. Connie Borab and Alison Hramiec, teachers at BDEA and members of the Pilot Schools Staff Network, noted that the opening section of an election-to-work agreement should include a mission statement, explanation of the school’s role as a Pilot School, purpose of the agreement, and priorities for the year. “After reading this section, [a staff member] should have a good sense as to whether his or her pedagogy or methodology would mesh with the mission of this particular school.” When a common understanding and agreement about the mission exists in a school community, a professional collaborative culture is able to develop.

The following is a list of characteristics of a shared school mission and vision statements. The list may be used when developing the statements, or to examine existing ones.

The school’s mission and vision:

- Is developed collaboratively by students, staff, families, and community members.
- Is expressed in clear language that is inspirational and free of jargon.
- Is known, understood, and owned by the whole school community.
- Is continually affirmed, celebrated, and made public to the whole school community.
- Forms the basis for the school community to assess progress indicators in achieving goals.
- Is revisited regularly.
Schools can follow simple steps to develop a mission that generates ownership among the school community.12

Step 1: Collect All Constituent Views on the Mission: Students, Staff, Administrators, Families, and Community Members

- Students, staff, administrators, families, and community members reflect on what they think their school ought to be like by responding to questions such as: What does my ideal school look like? What do I expect from my school?
- Staff views are collected at a whole-faculty meeting. In this meeting:
  1. Discuss the above questions.
  2. Examine the “Pilot Schools Network Vision, Mission, Principles and Practices” and align them with staff’s ideas of the ideal school. Small groups consider questions such as: What does each principle mean? Where do we see each principle in practice? What would the school look like if each principle were fully implemented?
- Students provide written responses as part of an essay competition or in-class discussions.
- Families and community members provide input through a simple survey or through focus-group interviews.

Step 2: Draft the Mission

Create an ad hoc mission committee or team. This committee synthesizes the views of students, staff, administrators, families, and community members, and writes a draft mission.

Step 3: Review and Redraft the Mission

Circulate the draft among all constituents for comment and consensus. The mission committee then makes any necessary revisions.

Step 4: Approve the Mission

Present the mission at a whole-faculty meeting for approval. Present the mission to the governing board for approval and adoption.

Step 5: Display, Celebrate, and Keep the Mission Alive

The whole school community affirms, displays, and celebrates the mission. Hold a public celebration of the mission that involves students, staff, parents, and community members. Display the mission in all rooms and use it as the basis for decision making in the school.
The following is an agenda developed by Beatriz Zapater, CCE coach. It can be adapted as a starting point for vision building in a Pilot School.

**Goals**

1. Staff will begin to develop a unified vision for what a graduate should know and be able to do, as well as the dispositions they’d like to cultivate in their students.

2. Staff will articulate ways in which they will support students to achieve the vision and expectations they have for them.

3. Staff will begin to develop the core values for the school, which emanate from the vision process.

8:00–9:00  **Breakfast**—Everyone together.

9:00–9:15  **Introductions; Review Goals, Norms, and Agenda** for the day; **short reading**.

9:15–9:40  **Welcome Students to Today’s Work**; dedicating today’s work to a student.

  • Think of one of your students to whom you will dedicate your work today—what are your hopes for that student?
  • Write his/her name on the tent card, write your name on the other side.
  • Share your hopes for that student.

9:40–10:30  **Powerful Learning Experience**

  • (5–10 mins) Write about a powerful learning experience you’ve had inside or outside of school. It can be an individual or group learning experience—learning is personal and meaningful with positive and lasting outcomes.
  • (10 mins) Discussion in pairs—list characteristics.
  • (15 mins) Group discussion—chart out characteristics.
  • (10 mins) Note common characteristics to summarize discussion.
  • (5–10 mins) Principles of effective learning and teaching.
  • (5–10 mins) Group discussion about common characteristics and where they are reflected in these principles. Discuss ways of incorporating them in the school vision statement.

10:30–10:45  **Break**

(continued)
**Developing the Vision (continued)**

10:45–11:30  **Chalk Talk—Vision for the Graduate**: What should a graduate from your school know, understand, and be able to do and demonstrate? In what ways will you catalyze and support your student’s success?

- Rotate to each chart paper.
- Highlight common ideas.
- Note values that begin to surface from the “silent conversation.”
- Remember the student you dedicated your work to this morning. What will you do for your student?

11:30–11:45  **Next Steps; short reading**.

11:45–12:00  **Reflections**
Successful schools encompass many facets of collaboration. Important questions about teaching and learning are at the forefront of meetings and conversations, and concrete goals are set for improvement.

4: Professional Collaboration

Professional collaboration is at the heart of every successful school. Teams and committees collaborate in Pilot Schools to address issues of teaching and learning and schoolwide issues such as schedule, budget, and professional development. Through the areas of autonomy, there is the capacity in Pilot Schools to carve out the necessary time, identify staff roles, and follow through on decisions, making professional collaboration effective and productive.

However, autonomy alone is not sufficient. Professional collaboration requires a school culture that is founded on trust and respect among all members of the community. In a longitudinal study of 400 Chicago elementary schools, Anthony Byrk and Barbara Schneider were able to document a strong link between the success of a school reform approach (through its academic results) and the degree of social trust present in the schools among all groups. “Teachers with students, teachers with other teachers, teachers with parents, and all groups with the school principal...all participants remain dependent on others to achieve desired outcomes and feel empowered by their efforts.”

Such a culture takes time and careful attention to build. As Peggy Kemp noted in chapter 2, she had a steep learning curve when she became principal of Fenway to learn how the school’s teams and committees worked and how to establish her relationship with staff, students, and parents.
Her willingness to listen to faculty critique allowed for the creation of a peer observation structure with the potential to improve teacher practice.

There is a large body of research that points to the importance of professional collaboration, trust, and collegiality to positive school outcomes. Successful schools encompass many facets of collaboration. Important questions about teaching and learning are at the forefront of meetings and conversations, and concrete goals are set for improvement. Teachers reflect continuously on their practice. Faculty members guide one another, plan together, coordinate their practices, and participate in the most important decisions of the school.

All of these elements together—faculty members working together, discussing important issues of teaching and learning, and taking a significant role in the school’s decision-making process—are the main work of professional collaboration. Such work is hard and complex. The emphasis on openness and dialogue itself creates challenges as differences of opinion, personality, and background rise to the surface. Often leaders need to develop new skills of listening, coordination, and communication to ensure that all voices are heard.

Pilot School staff, administration, and families have a head start in creating a trusting, collaborative culture for several important reasons: they share in mutual ownership of their schools; small size allows members to build strong relationships; and autonomy allows them to shape the structure and focus of the school. One Mission Hill School teacher emphasized that the small size of the school facilitates relationships and collaboration: “I know every single kid in this school and their families. This is our second family. That’s what it means to be in a small school—it’s more caring.” In order for teams, committees, and decision-making bodies to work effectively, certain nuts-and-bolts strategies and tools for collaboration should be employed. Norms, guiding documents, and external coaches as facilitators, can help meetings run smoothly. Communication with the entire school community through minutes and updates is essential for transparency about the issues being addressed.

The tools and vignettes in this chapter illustrate important aspects of professional collaborative work in a school. A vignette and a case study, focused on Josiah Quincy Upper School and Young Achievers Pilot School, respectively, highlight real faculty teams and committees as they grapple with the challenge of improving teaching and learning in their schools.

* Many useful tools exist for building collaborative culture. For more tools, visit the National School Reform Faculty: http://www.nsrfharm.org/
“Collaborate” means to work jointly with others, especially in an intellectual endeavor. The following tool outlines elements of a professional collaborative culture.

**Adult Collaborative Work Is Successful When:**

- Strong relationships are founded in trust.
- There is a norm established of publicly sharing work, and being open to dialogue, discussion, and critique.
- Substantive, intellectual discourse takes place with a defined purpose.
- There are multiple levels of collaboration occurring in the school (for example, within grade-level teams, the leadership team, committees, and the governing board).
- Defined structures and protocols exist (for example, facilitator, timekeeper, and recorder roles; agendas and minutes; reflective time).
- Assumptions are questioned and new perspectives are used to solve problems.
- Differences are treated with respect.

**Examples of Adult Collaborative Work in Schools:**

- Looking at student work in teams using defined protocols, and using these discussions to take steps to improve learning, teaching, and assessment.
- Observing classrooms, and having conversations with the teacher being observed to improve learning, teaching, and assessment.
- Developing a shared vision and common goals for moving the school forward with the input of the entire school community.
- Creating shared decision-making governance structures that engage the entire faculty and include representation of families, students, and community members. Teams, committees, and full-faculty and governing board meetings allow the school to decide on key instructional, programmatic, and budgetary issues.
- Working in teacher teams to plan and implement curriculum and assessments for shared students, including rubrics to assess student work.
- Working in study groups or committees to examine data, read and discuss literature, and form strategies and solutions for improving learning, teaching, and assessment.
- Serving on faculty panels to judge and assess student work that is presented through exhibitions, demonstrations, and portfolios.
- Collaboratively examining multiple sources of data to identify challenges, and then using an inquiry process to develop schoolwide goals and action plans.
Whole-Faculty Meeting: Josiah Quincy Upper School

The following vignette models how one school’s professional development plan grew directly out of its inquiry into students’ and teachers’ needs. Such an inquiry was possible because of the school’s teacher-centered approach to leadership.

Josiah Quincy Upper School (JQUS), which partners with the Quincy Elementary School to create a K–12 pathway for students, has two teacher team leaders for each grade level, and a headmaster, Dr. Bak Fun Wong, to oversee the school. According to one teacher, at JQUS “leadership is definitely shared. It’s his [Dr. Wong’s] whole philosophy. It’s like a circle of power, of leadership.” Another teacher stated, “Our school tries to have a lot of teachers as leaders.” Teacher team leaders at JQUS teach one less class, and take on more responsibilities that affect the direction of the school. They meet weekly with the headmaster and share information in their respective grade-level team meetings, where “issues are raised and everyone has a voice.”

At JQUS full-faculty meetings, the shared leadership is evident as teacher-leaders take on different aspects of the agenda. On a Wednesday afternoon, faculty gathered for a whole-faculty meeting from 1:30 to 2:30, then held subject-team meetings from 2:30 to 3:30. Conversation filled the room as staff caught up with one another and sat down with food in the cafeteria of the Washington Street building. The meeting schedule for the 2006–07 school year consisted of monthly whole-faculty meetings that incorporated study groups for professional development. Subject team meetings (math, science, English language arts, history, arts, and world languages) and grade-level team meetings (grades 6, grades 7 and 8, and grades 9–12) each take place two times per month.
Whole-Faculty Meeting: Josiah Quincy Upper School (continued)

Gathering data to design professional development experiences

“We’re going to launch our PD [professional development] groups today,” announced Steve Watson, English language arts (ELA) teacher and curriculum leader, as he opened the whole-faculty meeting. He first gave some background on how the study groups had been developed for this year. Last year, a curriculum committee of about 25 teachers from all grades had formed to examine what teachers and students had to say about teaching and learning at JQUS. Subcommittees began to explore the school schedule, educational values, student experience, and teacher experience. With the assistance of a researcher from CCE, data was collected from student and staff surveys and focus groups. All this work “helped inform the schedule and PD decisions,” Watson explained to the faculty.

The power of listening to students

After the meeting opening, faculty broke up into three groups to “process what we found out last year” through responses from the surveys. In the student experience group, social studies teacher and grades 7–8 team leader Jim Heffron reviewed that there had been seven focus groups total, covering all grades. He passed out a summary of student responses, grouped by the question themes (curriculum, instruction and assessment, overall success in school, student advice, classroom demographics, and classroom climate), and a small group of four teachers and staff reviewed the responses. In their focus groups, students had talked openly about what they experienced in their classes. They discussed what they could remember about what they learned, how the material from one class related to another, what motivated and supported their learning, and what got in the way.

As the teachers reviewed the student responses, they talked about their reactions. Tim Kelleher, a social studies teacher in grades 9 and 10, commented, “This has made my teaching better. I completely cut things out because of this.” “The kids were ruthless,” agreed a student support staff member.

Another teacher found, “Students want work that’s relevant to their lives outside of school. They want connections. They want input into what they’re learning about, and they like being able to work together in groups.” Teacher Pamela Chu, a grade 8 teacher of ELA, history, and media

(continued)
literacy, stated, “They like making their own decisions and choices. I think students just want to know what to expect, too. If a teacher is clear and organized, then the student knows what to expect.”

As the small groups reconvened into their larger group on the student questionnaire, faculty took turns sharing their discussions. One teacher found that “hands-on learning is most memorable,” while another stated that “students do forget a lot” between grades and “teachers have to re-teach ideas.” They discussed the need for summer work packets, differentiated instruction, and relevant curriculum—“We have to make sure we’re teaching something they can relate to”—and that strong teacher-student relationships exist. The teachers noted that the “students’ comments are sophisticated and observant.”

After engaging in spirited conversation, the whole faculty reconvened. “The quotes from students are very revealing,” said one teacher, “and on the whole we agreed with them.” The teaching practice group was hopeful about this year’s professional development, and the educational values group agreed: “We really want the professional development to land in concrete places that tie back into our teaching.”

**Study groups to extend teacher learning**

Based on what was learned from the data collected, the study groups for the year were announced. The topics speak directly to student and teacher concerns: 1) the Teaching for Understanding framework—an educational pedagogy that provides a language and strategy for enhancing efforts to teach for greater understanding; 2) differentiated instruction—varying instructional approaches to meet the diverse learning needs of students in a class; 3) cooperative discipline—an approach to discipline focused on collaborating with students and families to solve problems; 4) the International Baccalaureate (IB) program—an international education organization that offers rigorous curriculum and assessments; and 5) issues of race, ethnicity, language, and class—conversations and research relating to students’ cultural and economic backgrounds. The whole-faculty meeting came to an end with Heffron asking teachers to sign up for their top three study-group choices and then to break into subject-team meetings. The meeting was run entirely by teacher-leaders and was convened through the teacher-leaders and principal.
Whole-Faculty Meeting: Josiah Quincy Upper School (continued)

As the JQUS faculty engaged in new inquiries into teaching, the 2006–07 school year brought another shift that also focuses on how data can guide student and teacher success. The school’s team leaders began to examine data on student achievement in a more systematic way as a precursor to schoolwide examination of student data from MCAS tests and class work. Data analysis of student performance is opening new doors to understanding learning. The use of data informs development of student learning goals and new teaching strategies, and a culture of learning for all is growing and deepening.
The following study-group format and structure were developed by the teacher-leaders and principal at JQUS, with the input of the faculty. Topics were selected after a thorough inquiry into student and teacher views of teaching and learning at the school.

**Study Groups at JQUS in 2006–07**

**A Brief Description**

**Overarching Question:** What does it mean to be a learning community, and how can we, as a faculty, work collaboratively to build one?

Our “Areas of Exploration” introduce the following basic questions:

- What is the Teaching for Understanding framework, and how can I use it to reflect on and improve my practice and my students’ understandings?
- What is differentiated instruction, and how can I use it to engage the range of students in my classroom?
- How can cooperative discipline help me to build a learning community in my classes and in our community at large?
- What is the IB program, and how might we consider using it in our community? What are the benefits and implications that adopting this curriculum would raise?
- What are the commonalities and differences among us, and how do they impact the teaching and learning in our community? How do the issues of race, ethnicity, language, and class play out in our students’ lives and school experiences?

**JQUS Study Groups:** Small mixed-grade groups with the freedom and flexibility to explore a topic more thoughtfully and deeply.

**Format:** We have worked approximately ten hours of study-group time into our whole-faculty PD schedule. During this time you will meet in your study groups and have the opportunity to delve into one of our “Areas of Exploration” more deeply. In our efforts to achieve a true understanding of the topic, and due to the depth of each topic, we are going to stay in the same study groups for the entire year.

(continued)
Areas of Exploration

Teaching for Understanding

Teaching for Understanding (TFU) is an educational pedagogy that provides a language and strategy for enhancing efforts to teach for greater understanding. TFU asks the following four questions:

- What topics are worth understanding?
- What about these topics needs to be understood?
- How can we foster understanding?
- How can we tell what students understand?*

Differentiated Instruction

To differentiate instruction is to recognize students’ varying background knowledge, readiness, language, preferences in learning, and interests, and to react responsively. Differentiated instruction is a process to approach teaching and learning for students of differing abilities in the same class. The intent of differentiating instruction is to maximize each student’s growth and individual success by meeting each student where he or she is, and assisting in the learning process.†

Cooperative Discipline

To put it simply, cooperative discipline shows teachers how to work hand in hand with students, colleagues, and parents to solve the discipline dilemma. With “cooperative” as the byword, two achievements are possible: First, the classroom becomes a safe, orderly, inviting place in which to teach and learn. Second, student self-esteem increases, which must happen if we want students to behave more responsibly and to achieve more academically.‡

International Baccalaureate

The International Baccalaureate Organization (IBO) is a recognized leader in the field of international education, encouraging students to be active learners, well-rounded individuals, and engaged world citizens. Founded in 1968, it currently works with 1,889 schools in 124 countries to develop and offer three challenging programs to more than 486,000 students aged 3 to 19 years.§

Issues of Race, Ethnicity, Language, and Class

In our diverse urban educational setting, it is extremely important to explore what experiences our students bring into the classroom. Conversations and research relating to our students’ cultural and economic backgrounds can go a long way toward developing an effective educator-student relationship.

* Information taken from TFU website: http://learnweb.harvard.edu/ALPS/tfu/about2.cfm
† Information taken from http://www.cast.org/publications/ncac/ncac_diffinstruc.html
§ Information taken from IB website: http://www.ibo.org
Collaboration in Decision Making and Governance: Young Achievers Science and Mathematics Pilot School

I decided this was the school I wanted because of the sense of community. I was right. After my daughter began attending, she started talking about how groups of people can change things.

—Young Achievers parent

Professional Collaboration at Young Achievers

With more than ten years of experience as a Pilot School, the Young Achievers Science and Mathematics Pilot School has developed clear professional collaboration, decision-making, and governance practices. The school codified its philosophy and principles, organizational structure, and decision-making procedures in a School Governance Handbook and a Staff Roles and Responsibilities Handbook. Young Achievers has three key decision-making structures: the Educational Leadership Team, grade-level teams, and the governing board.* Friends of Young Achievers, which has its own board of directors, is a 501(c)(3) charitable organization created by the school to assist with relationship building and development efforts.

Educational Leadership Team

The Educational Leadership Team (ELT) represents all of the grade-level teams in the school and serves as the guiding vehicle for improving teaching and learning. At its first meeting of the 2006–07 school year, 15 staff members and administrators, representing diverse backgrounds and roles in the school, sat around several pushed-together tables to discuss how the ELT would function this year. As principal Jinny Chalmers explained, “We want this to have a real essential purpose to what you’re trying to do day-to-day.” The group first reviewed the ELT norms, and made suggestions and edits to the document.

* The governing board at Young Achievers has retained the name School Site Council; however, the board operates with the expanded authority of a governing board and will be referred to as such throughout.

(continued)
In order for the ELT to function, the school-based teams represented by the ELT members also need to be functioning effectively. The school’s CCE coach and founding principal of Young Achievers, Dawn Lewis, asked for a check-in on how the teams were doing so far. Each team’s facilitator made a brief presentation on what they were working on and how they were structuring their time. The grades 3–4 team facilitator said the team brainstormed ideas and decided that “all the focus is on writing with the intent of getting more fluency out of kids.” Student work samples and lesson plans were to be brought to future meetings, and then the team would discuss how that work would be assessed. Following a visit to the Mason Pilot Elementary School, the team used the Mason’s professional development calendar as a model for their own calendar.

The middle school team (grades 6–8) facilitator reported that the team decided to hold professional development meetings on Fridays and business meetings on Thursdays. According to the facilitator, “It’s nice to have the two meetings, because if an issue comes up we can table it [for the other meeting]. We make sure we talk about it, and that feels good.”

The grade K–2 team facilitator shared that the team met and discussed how to structure the team, including setting their goals and resolving logistics such as having food, note taker, and facilitator schedules for each meeting. However, they were struggling to move forward in the actual work of professional development.

Chalmers observed, “Some of the business has to get cut,” in order to move the team forward to work on issues of teaching and learning. What each team shared revealed a great deal about the challenges and value of collaboration at the team level.

In addition to the work going on in teams, the ELT is responsible for whole-faculty professional development. The group discussed lab classes (a process of teacher peer observation and reflection) and agreed that they should continue in the school. Staff referenced their visits to the Mason and the cross-sharing of resources, including looking at the lab class structure at the Mason. One person commented that it is helpful to have cross-level grade visits throughout K–8 because “it helps not to be isolated.” The principal observed that through lab classes, “watching each other and thinking collectively about our practice has strengthened our practice.” A teacher concluded, “It also helps to see for yourself the good things that
Collaboration in Decision Making and Governance: Young Achievers Science and Mathematics Pilot School (continued)

you’re doing.” The CCE coach suggested that the staff could visit more schools to observe lab class structures, and the ELT responded with interest. The coach agreed to contact schools and set up the visits.

The group moved on to discuss MCAS data, and John Licorish, assistant principal, presented spring 2005 open response results, results by individual classes, and a three-year comparison of results by percentage. “There’s bad news,” Chalmers stated, “but there’s a lot of good news in this data as well. One piece is that the longer kids are at our school, the better they do.”

“Let’s think about making the conversation with the whole faculty productive,” she said. The next day a whole-faculty meeting was to take place, and the ELT was reviewing the data first. “What should the goal of the conversation be?” was a question. The principal expressed her desire to recognize the tremendous work of staff, while also beginning to work toward improvement. A staff member said the message needs to be sent to families as well: “You don’t want families to be misinformed, and the information should be real and they should understand it.” Still another staff member wanted to create a “frequently asked questions” flyer as a guide for families.

Before the meeting ended, the group planned its next steps. For the next meeting, they agreed to discuss the instructional coach role and continue the MCAS conversation and next steps. Carol Murray, fifth-grade teacher and grades 3–5 team facilitator, typed up notes and sent them to the staff within the next few days. Grade-level teams would continue to meet and provide updates for the next ELT meeting in two weeks.

The work of the ELT at Young Achievers, glimpsed in one meeting, demonstrates important aspects of professional collaboration. All members were engaged, though it was challenging to bring in all voices consistently. The participants held trust and respect for one another, and were able to tackle challenging questions in an open forum. They stayed focused on teaching and learning—however, because it was the first meeting, some logistics needed to be established—and followed a clear agenda. There was a structure for following up on important topics and a general commitment to improving their process. Finally, the organizational structure of team facilitators convened as a governing body ensures that there is a whole-school approach to improving teaching and learning.
Collaboration in Decision Making and Governance: Young Achievers Science and Mathematics Pilot School (continued)

**The Organization of Collaboration: Governance Structures at Young Achievers**

The governance structures at Young Achievers — ELT, grade-level teams, governing board, along with the support of Friends of Young Achievers and its board — are an example of how professional collaboration can be organized effectively in a Pilot School.

As illustrated by the meeting described above, the Educational Leadership Team (ELT) focuses on clarifying and pursuing the school’s goals and objectives for teaching, learning, and student achievement. The team meets twice per month on the first Thursday evening of the month from 5:15 to 7:15, and one Friday morning a month from 9:00 to 11:30. The ELT is made up of grade-level team facilitators, role group facilitators/representatives (community teacher, and representatives from student support, specialist teachers, special education, health and safety, and program support), and the principal and assistant principal.

Facilitators have multiple roles and responsibilities that include planning, facilitating, and communicating. They facilitate team meetings: clarifying purpose and priorities, setting norms, selecting and leading protocols, guiding discussions, reflecting on meetings, and planning with coaches weekly. They also represent the team on the ELT, communicating the work and questions from the ELT back to the team for feedback. Finally, they organize and assign administrative tasks to the team and follow up to ensure timely completion of those tasks. Facilitators receive a stipend for this work.

The governing board at Young Achievers “is responsible for the governance of the school and has ultimate responsibility through standing committees that report their recommendations to the whole body,” according to the staff handbook. The board meets monthly and is composed of seven elected parents, seven elected staff, two nonvoting community members, and one eighth-grade student representative. The principal is automatically a member of the board and serves as one of its cochairs. The board evaluates the principal (although the principal does not evaluate herself), reviews and approves the school’s budget, monitors progress on the school’s strategic plan, and establishes and reviews policies and directions of the school. The board also approves the school’s annual election-to-work agreement.
Collaboration in Decision Making and Governance: Young Achievers Science and Mathematics Pilot School (continued)

Friends of Young Achievers, Inc. (FOYA) is a 501(c)(3) charitable organization created by the school to assist with relationship building and development efforts. FOYA and its board of directors work with the governing board to support the school’s mission. FOYA was created in 1999, four years after the founding of the school, as a private charity “to assist the school with the fundraising and outreach required to maintain its exceptional curriculum and implement its innovative eight-hour ‘seamless’ school day program.” FOYA raises money for a variety of needs that are identified by the school community. At present these include a state-of-the-art science lab, greater access to technology for students at school and at home, resources necessary to support the full range of learners, basic needs including nutritional food and mental health services, and consumable math and science supplies. Several Pilot Schools have or are in the process of creating their own 501(c)(3) organizations similar to FOYA.*
Q & A with Educational Leadership Team Member

The following Q & A features Heidi Cook, a sixth-grade humanities teacher and middle school team facilitator at Young Achievers.

Q: What perspective do you bring to the Young Achievers ELT?
A: I am the middle school team representative, so I bring issues that concern the middle school back and forth to the meetings. I bring the middle school perspective.

Q: What key decisions have you been part of?
A: Those decisions include:

- Setting budget priorities;
- Reworking the middle school staffing plan;
- Bringing in an outside assessment team to help us look at student achievement;
- Developing the professional development calendar.

Q: What successes has the ELT experienced?
A: The successes we’ve experienced are many. I’ve been especially excited to see some of our decisions about professional development go from a seed idea in ELT to effective practice in various classrooms. We’ve had success in bringing together many perspectives. All groups are represented, so essentially all staff of the school have a voice at that meeting.

Q: What challenges has the ELT faced?
A: As far as challenges go, the biggest tends to be focusing our time so that we can efficiently make decisions that can be forwarded on to the governing board or presented to staff. We are excellent at discussing issues, but sometimes bringing the conversation to a closing point so that a decision can be made is the tough part. We’ve used strict agendas and positions such as “friend of the chair” to keep the meetings on track.
Q & A with Executive Director of Friends of Young Achievers

The following Q & A features Helen Rosenfeld, executive director of Friends of Young Achievers, Inc. FOYA has a board of directors and is staffed by an executive director and business manager/development associate.

Q: Why do you think FOYA is an important organization for Young Achievers to have?
A: The existence of FOYA allows Young Achievers to focus on its core mission—educating youth. FOYA is critical to enabling Young Achievers to reach its goals, particularly as they pertain to supporting the extended school day. Being a separate nonprofit builds the school’s capacity to identify, accept, and manage large grants. While the principal is involved in FOYA activities, the structure takes the core fundraising responsibility away from the principal, who, in most schools, would be unable to consistently prioritize fundraising over the many tasks in their job. FOYA also offers another resource for the principal to rely on for communication, public relations, and an assortment of other needs.

Q: How does FOYA work with other governance structures at Young Achievers?
A: FOYA, as appropriate, presents information to the governing board, parent and family association, etc. FOYA does interact with members of these groups on a regular basis, as knowledge about the functioning of these entities enables FOYA to best communicate the interests of Young Achievers to the broader public.

Q: What are some successes and challenges FOYA has faced?
A: Since its founding FOYA has raised over $2 million for Young Achievers. FOYA has developed and maintains close relationships with a core group of individual donors who either donate personally or connect FOYA to other donors. While the primary challenge for FOYA is raising money to support its operating expenses, core funding does offer FOYA stability.


**Norms: Young Achievers Educational Leadership Team**

The following norms were developed by the Educational Leadership Team with their CCE coach. The norms were reviewed at the first ELT meeting of the school year, and are revisited as needed throughout the year.

- Listen (openly and actively).
- Honor start and end times.
- Offer mutual respect for: opinions, beliefs, background, and differences.
- Watch your air time and reflect on your practice.
- Strive for a common language and ask for clarification.
- Communicate your needs and expectations and trust that others are coming from a place of good intentions.
- Always have an agenda.
- Exercise forethought—avoid “last-minute” decisions.
- Members who are absent from a meeting will call another member who was present to find out what happened at the meeting.
- When possible, the ELT will try to reach a consensus in making its decisions.
- Seek first to understand and then to be understood.
Decision-Making Procedures

There are many ways a group can make a decision. A variety of decision-making methods have value and are appropriate in certain situations. Some of the variables considered in determining the most appropriate decision-making process are the following:

• Time and resources available;
• Type of decision to be made;
• Importance of the decision to the organization or individual;
• Expertise and experience of the participants in the content of the decision as well as in their function as decision makers;
• Potential value of the opportunity to create a stronger team through the decision-making process.

All groups and teams making decisions will follow the process outlined below:

• Discuss and identify parameters of the decision.
• Identify who will be affected and how they will be involved.
• Develop a timeline.
• Identify the decision-making method to be used (see below).
• Identify a communication strategy.
• Discussion should be guided by the questions below:
  - What is the issue?
  - What do we believe? (values, philosophy, beliefs, guiding principles)
  - What do we know? (research, experience, best practice)
  - What is the desired result? (ultimate goal)
  - What resources are needed and available? (human, time, fiscal, physical)
  - What do we do? (action, responsibility, implementation, evaluation)

Methods of decision making

There are a number of options by which groups can make decisions. These include:

• Decide and announce
  The designated leader makes the decision using the information available at the time.
• Gather input from individuals and decide
  The designated leader asks selected individuals for input (ideas, suggestions, information) and then makes a decision.

(continued)
### Young Achievers Decision-Making Procedures (continued)

- **Gather input from team and decide**
  
  The designated leader asks the team members to share their ideas in a meeting. The leader decides after hearing from the team.

- **The team gathers input from individuals and decides**
  
  The team asks individuals for their input and then decides.

- **Team decision by majority-rule voting or polling**
  
  The team makes a decision based on the choice of 50 percent plus one of the people on the team.

- **Decision by consensus**
  
  A consensus decision is one about which all members have had an opportunity to give their opinion and to understand the implications of various options. All members, including the leader, have the same formal power to support or block proposals. A consensus decision is one that each and every member of the group/team is willing to support and help implement. If consensus cannot be reached, the leader has a fallback decision-making option.

- **Delegate with constraints**
  
  The leader defines the decision that needs to be made in the form of a question(s), clarifies the constraints (e.g., budget, timeframe), and delegates the decision to others as long as it adheres to the constraints.

### Decision categories and individuals/groups responsible

Below is a grid that identifies categories of decisions and which individual/team or group is responsible for the decision-making process. The leader or group must decide the method to be used for making a decision. If time and resources permit, individuals or other teams who will be affected by a decision are invited to join the team in the decision-making process. It is the responsibility of the team to make sure that those people who need to be involved in a decision are invited into the process from the beginning.

There are several commitments that are at the heart of all that we do at Young Achievers, and they are therefore embedded and considered in all decisions we make and not separated out as independent decisions. These are the following:

- a vital partnership with each child’s family;
- antiracist pedagogy and interpersonal relationships;
- meeting the needs of the wide range of learners in the school;
- use of data in making effective decisions.
### Decision-Making Bodies at Young Achievers

<table>
<thead>
<tr>
<th>Decision Category</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy</td>
<td>Governing board</td>
</tr>
<tr>
<td>Schedule</td>
<td>Educational leadership team (ELT)</td>
</tr>
<tr>
<td>Curriculum development</td>
<td>ELT</td>
</tr>
<tr>
<td>School-based rules</td>
<td>Student support team, given authority by principal</td>
</tr>
<tr>
<td>Procedures/class placement</td>
<td>Located with different grade-level teams, school-based teams (e.g., nurse, office), in consultation with principal and assistant principal</td>
</tr>
<tr>
<td>Staffing and hiring</td>
<td>Recommendation from representative committee to principal</td>
</tr>
<tr>
<td>Professional development</td>
<td>ELT</td>
</tr>
<tr>
<td>Program development and evaluation</td>
<td>Begins with a school-based team responsible for the program element. The school-based team recommends to ELT</td>
</tr>
<tr>
<td>Facilities</td>
<td>Principal</td>
</tr>
<tr>
<td>Fundraising</td>
<td>Principal/FOYA</td>
</tr>
<tr>
<td>School-based practices</td>
<td>ELT</td>
</tr>
<tr>
<td>Individual goal setting and evaluation</td>
<td>Supervisory relationship</td>
</tr>
</tbody>
</table>
Team or committee members need to fill a number of different roles so the team operates smoothly. These roles can be rotated among the members, but teams often choose to keep the facilitator or team leader consistent because of the complexity of that role. Teams should spend time during their first meetings deciding what roles will fit their work and help them reach their goals. These roles could include, but are not limited to: facilitator, recorder, timekeeper, and observers. Any roles a team decides to use are not the exclusive responsibility of the person who takes on that role. All team members are responsible for making sure all roles are working effectively.

Descriptions of Team Roles

**Facilitator or Team Leader**—The team leader’s primary responsibility is managing the process of the team and helping team members stay focused on their purpose, goals, and norms. The team leader should also help build commitment and the confidence of the group. Perhaps most important, the leader is not there to control or run the team, but to create opportunities and a tone that allows all members to use their skills to help the team.

Running effective meetings is one way a team leader helps the team reach its goals. The leader’s responsibility for running effective meetings includes distributing an agenda two or three days before each meeting, making sure team members’ ideas are heard, and keeping the meeting focused on the agenda and the issues that are being discussed. The facilitator ensures reflection at the end of each meeting to see how effectively the team worked together during the meeting.

**Recorder**—In addition to taking minutes of the meetings, this person is also responsible for communicating with groups outside of the team, such as parents, other teachers, and the principal.

**Timekeeper**—This person keeps a close eye on the progress of all meetings to make sure the entire agenda is addressed. Because it is often hard to keep people on task and within the timeframe the group has agreed to, the timekeeper is vital to making sure the team addresses all agenda items during each meeting.

**Observers**—Essentially all team members take this role and watch carefully to see how the team is operating in relation to the norms, goals, and purpose. It is everyone’s job to observe and give feedback on how team members interact with each other and how the group maintains its focus.
Components of Effective Meetings

Meetings should be productive and efficient. Below are components of effective meetings.9

• An agenda is distributed in advance.
• Meetings start and end on time.
• All team members participate in the discussion.
• Team members ask clarifying questions when something is unclear.
• Discussion stays on topic.
• Plans about who will do what by when are finalized and recorded, and issues that require follow-up are carried over to the next agenda.
• Minutes are recorded and shared with team members and others.
• Commitments are carried out prior to deadlines.
• Meetings are evaluated periodically for productivity, thoughtfulness, and how well members interact.
Building a Professional Collaborative School Culture: How Are We Doing?

As a school reflects on its professional collaborative culture—either for the first time or as an ongoing review—the following survey can be useful and thought provoking. Take time to individually complete the survey and then meet in small groups to compare and discuss findings.

For the following questions, rate where you think your school is on the following continuum:

1 = No, or rarely, or only a few teachers.
2 = Some, but not much, or not everyone.
3 = Most teachers and teams do fairly regularly.
4 = All teachers do regularly.

Do We:

_____ Look at student work in teams using defined protocols, and use these discussions to take steps to improve learning, teaching, and assessment?

_____ Observe classrooms and have follow-up conversations with the teacher whose classroom is being observed to improve learning, teaching, and assessment?

_____ Work in teacher teams to plan and implement curriculum and assessments for shared students?

_____ Engage in text-based discussions?

_____ Use consultancies in teacher groups as a means to bring instructional dilemmas to the forefront and receive feedback on them?

_____ Work in study groups to examine data, conduct action research, and try new strategies for solutions for improving learning, teaching, and assessment?

_____ Serve on faculty panels to judge and assess student work that is presented through exhibitions, demonstrations, and portfolios?

_____ Work in teacher teams to develop rubrics for assessing student work?

_____ Collaboratively examine multiple sources of data to identify challenges, and then use an inquiry process to develop schoolwide goals and action plans?

(continued)
For the following questions, rate where you think your school is on the following continuum:

1 = No.
2 = We are at the beginning stages.
3 = We have, and many but not all are/were involved.
4 = Yes, and most everyone is/was involved.

Have We:

_____ Set norms as a faculty for how we work with each other?
_____ Developed a shared mission and common goals among the entire school community for moving the school forward?
_____ Developed schoolwide principles, values, or habits of mind?
_____ Created a shared decision-making governance structure that engages the entire faculty through teams, committees, and full-faculty meetings on key instructional, programmatic, and budgetary issues of the school?
Below is a sample protocol for use in building a professional collaborative culture.  

**Purpose:** To get feedback on a set of questions or concerns posed by a teacher about certain aspects of student or teacher work.

**Directions:** A presenter and a facilitator work with a group of participants to examine student or teacher work.

**Step 1.** The presenter gives a quick overview of the work, highlighting the major issues or problems with which he or she is struggling, and frames a question for the consultancy group to consider. The framing of this question, as well as the quality of the presenter’s reflections on the work and/or issue being discussed, are key features of this protocol. (10 minutes)

**Step 2.** The consultancy group asks clarifying questions (questions that have brief, factual answers) of the presenter. (5 minutes)

**Step 3.** The group then asks probing questions of the presenter. These questions should be worded to help the presenter clarify and expand his or her thinking about the issue or questions that he or she has raised for the consultancy group. The goal here is for the presenter to learn more about the question he or she framed or to do some analysis of the issue presented. The presenter responds to the group’s questions, but there is no discussion by the larger group of the presenter’s responses. (10–15 minutes)

**Step 4.** The group then discusses the work and issues presented: What did we hear? What didn’t we hear that we need to know about? What do we think about the question or issue presented? Some groups like to begin the conversation with “warm” feedback, answering questions such as “What are the strengths in this situation or in this student’s work?” “What’s the good news here?” The group then moves on to “cooler” feedback, answering questions such as “Where are the gaps?” “What isn’t the presenter considering?” “What might be areas for further improvement or investigation?” Sometimes the group will raise questions for the presenter to consider: “I wonder what would happen if…?” “I wonder why…?” The presenter is not allowed to speak during this discussion, but instead listens and takes notes. (15 minutes)

**Step 5.** The presenter then responds to what he or she has heard. (10–15 minutes)

**Step 6.** The facilitator leads a brief discussion about the group’s observations of the process. (5–10 minutes)

(continued)
Some Tips for Consultancies

**Step 1:** The success of the consultancy often depends on the quality of the presenter’s reflection in step 1, as well as on the quality and authenticity of the question framed for the consultancy group. However, it is not uncommon for a presenter to say at the end of a consultancy, “Now I know what my real question is.” That is fine, too. It is sometimes helpful for the presenter to prepare ahead of time a brief (one- or two-page) written description of the issues for the consultancy group to read as part of step 1.

**Steps 2 and 3:** Clarifying questions are for the person asking them. They ask the presenter “Who, what, where, when, and how.” These are not “why” questions. They can be answered quickly and succinctly, often with a phrase or two.

Probing questions are for the person answering them. They ask the presenter “why” (among other things), and are open-ended. They take longer to answer and often require deep thought on the part of the presenter.

**Step 4:** When the group talks, it is helpful for the presenter to pull her/his chair back slightly away from the group. This protocol requires the consultancy group to talk about the presenter in the third person, almost as if he or she were not there. As awkward as this may feel at first, it often opens up a rich conversation. Remember that it is the group’s job to offer an analysis of the issue or question presented. It is not necessary to solve the problem or to offer a definitive answer.

It is important for the presenter to listen in a nondefensive manner. The presenter should listen for new ideas, perspectives, and approaches and listen to the group’s analysis of his or her question/issues. The presenter should listen for assumptions—both his or hers and the group’s—implicit in the conversation. The presenter should also be alert for judgment by the group; this is not supposed to be about the presenter, but about a question he or she has raised. The presenter should remember that he or she asked the group to help with this question or issue.

**Step 5:** The point of this time period is not for the presenter to give a “blow-by-blow” response to the group’s conversation, nor is it to defend or further explain. Rather, this is a time for the presenter to talk about what were, for him or her, the most significant comments, ideas, and questions heard. The presenter can also share any new thoughts or questions he or she has had while listening to the consultancy group.

**Step 6:** Debriefing the process is key. Do not shortchange this step.
Pilot Schools are held to high levels of accountability through the School Quality Review process and regular assessments, and are in turn given greater authority at the school level. Through governing boards, increased responsibilities are granted to the people closest to the students and most familiar with the school. Governing boards are responsible for:

- Setting and maintaining the school mission;
- Principal selection, supervision, and evaluation (with the superintendent having final approval);*
- Budget and election-to-work agreement approval.

The *Boston Pilot Schools Manual* states:

Essentially, it is the governing board’s charge to keep the vision of the school front and center, to ensure that the school is performing at high levels, and to enable all of the school’s constituencies to have a voice in the school’s development.¹

Governing boards take the place of state and district school site councils, which typically serve in an advisory role to the principal. In contrast, governing boards exercise greater decision making in key aspects of school operations, and are similar to the role of a nonprofit board of directors. The Mason Pilot Elementary School summarized governance before and after their conversion to Pilot status in a chart, “Piloting Improvements in Our School.” Before Pilot status, shared decisions were made by the

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⁰ In Boston, “principals” are the leaders of elementary and middle schools, and “headmasters” are the leaders of high schools. For high schools, “principal” and “headmaster” will be used interchangeably here.
Governing board decision-making power is shared among constituents, as boards are comprised of staff, administration, community representatives, families, and for high schools and some middle schools, students. Principals are always governing board members. The Mission Hill School governing board, for example, is comprised of five staff members, including the principal, five parent/guardian members, five community members, and five student members. One to two alternates for each constituent group have a seat at the table and participate in discussions, but only vote if a regular member is absent.

Board members are elected by their respective groups, with the exception of community representatives, who are appointed to the board by the other elected representatives. Community representatives are generally selected from businesses, foundations, colleges and universities, local government, and the district. They are important additions, as they are able to widen the board’s perspective and leverage resources for the school.

Standing or ad hoc subcommittees of the board are often created to address different issues pertaining to the school. At the Mason Pilot Elementary School, the governing board includes subcommittees on budget; personnel; development and Friends of the Mason; after school; and professional development. TechBoston Academy’s governing board chairperson and community representative, Steve Miller, called governing boards “a focal point for communication” among constituents, and noted that boards provide schools with internal guidance through evaluation, and external legitimacy through partnerships and fundraising.

All governing boards must have a set of written and approved bylaws that outline the board’s membership, election procedures, terms of office, duties, officers, number of meetings per year, decision-making procedures, and methods of communication with the larger school community. Governing boards, which also assume the role of state-mandated school councils, must meet the requirements of state law on school site councils. In Boston, as part of the Boston Teachers Union contract, governing boards must have at least four teachers as members.

Laina Cox, a sixth-grade teacher at the Harbor School, explained, “I had a lot to take part in as a beginning teacher at the Harbor School,” including sitting on the governing board. “Any ideas you have, you get to put them into place. That has been a great part of my experience [in a Pilot School].”

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*Web link: For more information on the Mason Pilot Elementary School governing board, visit http://www.masonpilotschool.org/board.htm*
Governing boards are able to be powerful advocates for their respective schools and collectively as a network. Over the years, Pilot School board chairpersons and principals have advocated together on behalf of all Pilot Schools on many issues, including creating a common template for memorandums of agreements, influencing union contract language, building political support for increasing the number of Pilot Schools and Horace Mann charter schools, establishing an equitable funding formula, and developing a fair plan for the placement of students with special education needs. In 2000, the Pilot School governing board chairpersons urged the creation of more Pilot Schools:

We now have promising findings that in four short years...the Boston Pilot Schools have begun to demonstrate that, when urban public schools are provided increased autonomy to adopt innovative practices while being held accountable for results, student outcomes will improve.6

Governing boards are continually working to develop their roles. An annual session is held by CCE for governing board members to review roles and responsibilities and to share practices across schools. The 2007 session included workshops on election-to-work agreements, shared decision making, and principal evaluation. To begin, governing board members were asked to share successes their governing boards had experienced during the school year. A Young Achievers staff member shared that this year “the governing board represents the racial diversity of the school.” For a teacher from Boston Community Leadership Academy, “putting together a successful work agreement the past five years that has changed with the needs of the school” was a success. A Lilla Frederick Pilot School parent added, “We brought in a variety of resources for the school, including a mental health partnership and over one million dollars in new laptops and technology.”7

Board development also takes place in the Pilot Schools Network leadership meeting. During one meeting, leaders broke into small groups of grades K–8 and 9–12 leaders to discuss governing boards and share copies of board bylaws, principal evaluation processes, and election-to-work agreements. A new leader had specific questions about the governing board. “Just pick up the phone and call us” with questions, said Amy Marx, principal of the Harbor School, on behalf of veteran Pilot School principals to new principals.8
The Boston Arts Academy (BAA) governing board, the board of trustees, has created a number of standing and ad hoc subcommittees. BAA has a large board compared to most Pilot Schools due to its unique history, mission, and dual curriculum. The list, which provides committees, purposes, and chair(s) of each committee (not listed here), outlines areas of work in which governing boards may engage.

**Standing Committees**

**Governing Council**

Purpose: To serve as the executive committee of the board of trustees.

**Benefit Committee**

Purpose: To assist in development and fundraising for the BAA Foundation, which must raise over one million dollars annually to drive and support the efforts of the school. This committee’s primary function is to plan and oversee the Annual Gala Benefit.

**Finance Committee**

Purpose: To provide oversight and review of BAA finances, prioritize short- and long-term funding needs, and develop fiscal-year budgets for presentation to the board for its review and approval.

**Leadership and Development Committee**

Purpose: To seek and cultivate membership for BAA board of trustees and committees. To research and interview potential future board members and to present nominations to the full board for a vote.

**Ad hoc Committees**

**Community Relations**

Purpose: To serve in an advisory role to the BAA administration by building a network that can formulate answers to the community concerns and issues that arise.

**Facilities**

Purpose: To work with consultants and community members to oversee BAA’s spatial planning and facility needs study.
Principal Selection, Evaluation, and Supervision

Principal selection, evaluation, and supervision are perhaps the most important responsibilities of Pilot School governing boards. The superintendent has given over power to the governing board in order to allow the school community greater control over selecting the right leader for the school, as one Pilot School staff member explained.9 When selecting a principal, governing boards are able to develop their own internal process for recruitment, create a job description and hiring committee, screen and interview candidates, and select the finalist candidate. The governing board then forwards one recommended candidate to the superintendent for consideration. If the superintendent does not wish to hire the nominee for the position, she/he may request that the board submit another candidate. The superintendent selects and hires the principal in consultation with the board.

Once their school’s principal is hired, governing boards are responsible for his or her evaluation. Every board must have an approved, written process for principal performance evaluation, including the criteria for evaluation, and part of the evaluation must be based on the BPS “Expectations and Practices for School Leaders.”10 The board may determine the evaluation process and forms used. Many governing boards have developed surveys and interview processes for staff, students, and families to engage the entire school community in the principal evaluation. Other boards have created subcommittees for evaluation. Principals must be evaluated yearly, although an in-depth evaluation with the entire school community’s input need occur only every two to three years.

A challenge for some governing boards has been to develop the capacity among board members to effectively evaluate the principal. It is important to have board members be clear about governing board membership, roles, structures, and responsibilities. A survey exists to assist boards in determining their capacity to evaluate the principal (See “Governing Board Survey”). If a Pilot School governing board does not have the capacity, it may choose to ask the respective deputy superintendent to conduct the evaluation. In this case, the board must consult with the deputy superintendent prior to the evaluation about the criteria to be used to evaluate the principal.

All principal evaluations must be submitted to the superintendent by mid-June of each school year. If the board plans to recommend the principal for nonrenewal, it must inform the superintendent by the end of March. Governing boards may request that the superintendent extend the principal’s annual contract to two or three years.
The following survey evaluates a Pilot School governing board in areas that are working well and areas that need to be addressed in terms of membership, roles, structures, and responsibilities. The survey can be used by the governing board to determine whether it has the capacity to evaluate the principal, or whether to consult with the deputy superintendent on the evaluation. Responses should be a majority of 1’s or “This is working well and in place.”

1 - This is working well and in place.
2 - The board has a plan in place to address this.
3 - The board has not addressed this yet.

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<thead>
<tr>
<th>Areas</th>
<th>1 (✓)</th>
<th>2 (✓)</th>
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<th>Comments</th>
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<tr>
<td><strong>Membership</strong></td>
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<tr>
<td>1. Board membership is in place and meetings take place on a regular basis (monthly, for example).</td>
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<td>2. The board is equally representative of the school’s staff (including administrators), families, community members, and for high schools and some middle schools, students. At least four teachers are on the board.</td>
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<td>3. The board has a role in the recruitment of new board members to ensure that all seats are filled.</td>
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<td>4. There are clear procedures for election of board members and for appointment of community members.</td>
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<td>5. The total number of board members is no less than 10 and no greater than 25.</td>
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<td><strong>Roles</strong></td>
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<tr>
<td>1. The board has a process for the orientation of new members.</td>
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<td>2. The board has a chairperson or cochairpersons. The chairperson is not the principal alone.</td>
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<td>3. Board members attend meetings regularly and are active participants.</td>
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<td>4. Rotating meeting facilitator and note-taker schedules are followed.</td>
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<td>5. The board regularly communicates with the school community. For example, notes, meeting dates, and agendas are shared and posted publicly.</td>
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<td>6. Board members work to create partnerships and leverage resources for the school.</td>
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### Governing Board Survey (continued)

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<tr>
<td><strong>Structures</strong></td>
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<tr>
<td>1. The board has a written and approved set of bylaws that outline the board’s membership, election procedures, terms of office, duties, officers, and number of meetings per year.</td>
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<td>2. The bylaws include clear decision-making procedures (decisions are made by consensus or by vote, for example).</td>
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<tr>
<td>3. There is a written and approved principal evaluation process in place.</td>
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<td>4. An election-to-work agreement exists for staff and includes a dispute resolution procedure.</td>
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<td><strong>Responsibilities</strong></td>
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<tr>
<td>1. Board members support and maintain the mission of the school.</td>
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<tr>
<td>2. The board approves major initiatives of the school.</td>
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<td>3. The board annually evaluates the principal or consults with the respective deputy superintendent on the evaluation, and sends the evaluation to the superintendent for final approval.</td>
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<td>4. The board annually approves the school budget.</td>
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<td>5. The board annually approves the election-to-work agreement and provides the agreement to the staff.</td>
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<td>6. The board conducts an annual review of the school’s progress on student engagement and performance indicators and ensures that there is a plan to address gaps by race, income, and other areas.</td>
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Below are recommended guidelines that Pilot governing boards should use in developing and approving their annual principal evaluation processes.¹¹

1. Ensure that there is a written and approved job description for the principal. As well, the board should annually work with the principal to agree on a set of three or four measurable goals to be accomplished, particular to the school year. Every governing board should keep in mind that the current superintendent has two ongoing goals that can be used as a touchstone:

   • To improve student achievement for all students;
   • To narrow the achievement gap for Black, Latino, English language learner, and low-income students.

   The mutually agreed upon goals should be accompanied by an agreement on the support the governing board will provide to the principal in accomplishing the goals, including using the deputy superintendents as a resource.

2. The annual evaluation should include collection of the following data:

   • A self-evaluation or assessment by the principal of his/her performance in relation to the job description and annual goals.
   • Collection of other data, such as student, staff, and parent surveys; outcomes from student, staff, and parent focus groups; review of student engagement and performance data; review of the progress in meeting the annual expectations of the prior year.

3. The governing board should then analyze all collected data and synthesize findings, producing a written document that includes commendations and recommendations for improvement. This document should be reviewed with the principal, and a plan for addressing the recommendations and any additional support that is needed should be agreed on. Once completed, the evaluation summary should be submitted to the superintendent and the school’s principal.

4. The superintendent shall acknowledge receipt of the annual evaluation to both the governing board chairperson and the school’s principal.

(continued)
Role of the chairperson

The role of the Pilot governing board chairperson is critical in the annual evaluation of the principal. It is the chairperson’s role to ensure that:

- There is a written job description for the principal.
- There is a written and approved policy for annual evaluation of the principal, as well as annual goals mutually agreed to with the principal.
- An evaluation subcommittee is formed in a timely fashion each year.
- The evaluation process is carried out in a timely manner and in accordance with the board’s approved evaluation policy.
- The evaluation’s findings and recommendations are written up in a timely fashion, approved by the entire board, and submitted on time to the superintendent.
- The governing board’s evaluation subcommittee meets with the principal to review the findings and recommendations and to agree on next steps and future goals.
The following evaluation process was developed by Dania Vazquez, CCE coach, and used with several schools. The questions are aligned with the BPS “Expectations and Practices for School Leaders” and the Pilot Schools’ School Quality Review Process.

**Overview**

1. The governing board decides which members will conduct the review. Preferably, the personnel committee and the board chair will conduct the review.

2. The principal writes a reflection.

3. The personnel committee and the board chair review the guiding questions. Each team member chooses an area of interest on which to interview staff, students, and community members.

4. A day is scheduled for board members to visit the school and conduct interviews, with an organized schedule given to staff and students in advance. Interviews should be limited to 30 minutes to allow time for board members to capture notes and thoughts between meetings. A cross-section of staff, students, parents, and community members should be included in the interviews. The BTU representative and the parent council representative are also key school members to be included in this process. The group should meet with the principal at the end of the day and review the written reflections as well as pose any clarifying questions and share some preliminary impressions of the day.

5. At the end of the day, the board members meet to debrief their impressions, interviews, and observations. As much as is possible, facts and opinions need to be sorted with supporting evidence and documentation. The board chairperson is then responsible for writing the evaluation.

6. The board chairperson should meet with the principal and share the formal written evaluation before sending this to the superintendent. At the subsequent board meeting, the full board membership should also be apprised of the result of the review.

(continued)
Guiding Questions for Evaluation of School Leaders

1. School Mission/Philosophy
   - How is the philosophy articulated internally in all the community; externally to others?
   - Has the mission/philosophy changed this year? If so, how?
   - Does everyone in the community—students, parents, staff—understand the direction of the school? How is this evident?
   - What parts of the mission are evident and to what degree? What parts are not?
   - How does the leadership keep and model the vision?
   - What partnerships have been established to support the mission?

2. Instructional Leadership
   **Curriculum**
   - What are the school’s goals for students?
   - What are the standards articulated to students, families, staff? How are these articulated?
   - How is each core curriculum component being developed and implemented: math, science, literacy, social studies, foreign languages?
   - How does the leadership ensure a coherent curriculum?
   - How does the leadership ensure equitable and rigorous learning for all students?
   **Assessment**
   - What are the assessment practices and how do these support instruction?
   - How is student performance data used to inform practice?
   - How are the students with special education needs supported through instructional practices?

3. Professional Development and Supervision
   - What are the on-site opportunities for staff?
   - What are the off-site opportunities for staff?
   - How are professional development activities planned for and coordinated?
   - How do the professional development opportunities for staff support the mission/philosophy of the school?
   - How does the leadership promote effective instruction and high-quality work in all classrooms?
   - How are new teachers oriented and supported?
   - How is the work of staff and leadership assessed? How do staff members receive feedback on their practice?

(continued)
### 4. Families and Community Partnerships

- How does the leadership involve and work with families to improve student outcomes?
- How does the leadership work with community members and external partnerships to forward the school mission and goals?

### 5. School Organization and Management

- How does the leadership organize the school day/week/year to support the achievement of teaching and learning goals?
- How are administrative duties and tasks handled?
- How is the overall scheduling of various components working?
- How are crisis situations addressed?
- How does the administrative team work? To forward the mission? To solve problems?
- How does the budget support the school mission?

### 6. Leadership Practices and Governance

- What are the leadership practices that establish the tone of the school?
- How does the leadership communicate with staff, families, and students concerning instruction, practice, expectations, policies, and future planning?
- How are decisions made?
- What governing bodies exist in the school and how do these work with the school leadership in shaping the school vision and direction?
- How has the leadership worked with the governing board? What has been effective or not?
- How has the leadership worked with district and union? What has been effective or not?

### Reflective Questions on Leadership

- What have been the successes and challenges of this year?
- What might have you done differently this year? Why?
- What will you change for next year?
- What will you maintain/continue developing for next year?
- What have you learned as a leader this year?
- What supports were most valuable for you as the school leader this year?
- How will you nurture and sustain your work as school leader?
As part of its principal evaluation, the Harbor School governing board conducts surveys of staff, students, and families. Below is an excerpt of questions from the surveys developed by the governing board with Dawn Lewis, CCE coach. Responses include “usually,” “sometimes,” “rarely,” “don’t know,” or “doesn’t apply,” and room for comments accompanies each question and the overall surveys.

**Staff Survey**
1. Exercises authority in a fair and consistent manner.
2. Provides for meaningful staff involvement in school decisions.
3. Maintains high standards for academic achievement.
4. Maintains high standards for student behavior.
5. Welcomes feedback from staff and families.
6. Supervision and evaluation of staff is clearly outlined and implemented.
7. Ensures that staff meetings are meaningful.
8. Respects and adheres to negotiated contracts.
9. Professional development for staff is relevant, meaningful, and well planned.
10. I feel comfortable talking to the principal about a variety of issues or concerns.

**Student Survey**
1. Has clear and high expectations for keeping the school orderly and safe for students.
2. Has clear and high expectations for academic achievement for every student.
3. Involves students in some decisions at the school.
4. Recognizes achievements and accomplishments of students.
5. Is able to listen and be attentive to students’ concerns and needs.

**Parent Survey**
1. Is fair and consistent in making decisions.
2. Has developed caring, supportive relationships with parents and families.
3. Listens to parents’ and families’ suggestions and concerns.
4. In what ways do you think the principal has been most successful in her/his position?
5. In what ways could the principal improve in her/his position?
The TBA governing board developed the following headmaster evaluation process, including a timeline and tasks, with its CCE coach, Amy Bayer.

**Between June and the end of September:**

- Set up governing board Headmaster Evaluation Committee to conduct the process.
- With the headmaster, examine and, if needed, revise the headmaster job description.
- With the headmaster, agree on a set of qualitative and quantitative goals grounded in the BPS “six essentials” described in the “Expectations and Practices for School Leaders,” as well as three or four personal goals offered by the headmaster that either emerged out of the previous year’s evaluation or represent areas of desired future growth.
- With the headmaster, agree on a set of measurements and methods to track progress toward these goals. The data collection should include feedback from faculty, parents, students, and BPS personnel as well as numerical data such as attendance, MCAS scores, faculty turnover, etc.

**In October/November:**

- Discuss all of the above with the full governing board and advisory committee.
- Talk with the cluster deputy superintendent to coordinate evaluative efforts.

**In December or January:**

- Evaluation committee conducts an initial data collection and site visit.
  - Spends a day at the school interviewing a representative cross-section of faculty, staff, parents, and students.
  - Headmaster creates an advance list of who will be interviewed in each 30-minute segment.
  - Debrief and then discuss with headmaster.
- Conduct a staff and parent survey.
- Review the tentative survey findings with the headmaster.
- Report on that discussion to the governing board and advisory committee.
- If significant performance issues have arisen, the appropriate deputy superintendent will be consulted.

(continued)
Headmaster Evaluation Process: TechBoston Academy (continued)

**In April or May:**
- Headmaster writes a self-evaluation based on the goals.
- Evaluation committee collects and examines the full year’s worth of data.
- A draft evaluation is written by the evaluation committee and discussed with the headmaster.
- A final draft is written by the evaluation committee, with the headmaster having the option of writing a personal statement, and then discussed with the entire governing board and advisory committee.

**In May or June:**
- The final evaluation is sent to the appropriate deputy superintendent.
- The following year’s governing board Headmaster Evaluation Committee is appointed.
The following document is the evaluation summary and contract request/recommendation from the TechBoston Academy (TBA) headmaster evaluation in 2006. Subsequent evaluation sections (not included here) describe the evaluation process—which included staff, student, and parent surveys—TBA school goals, and in-depth analysis of each area of evaluation.*

In the context of Boston’s Public Schools, TBA is an outstanding performer. Attendance averages 94%, compared with the systemwide average of 82%. The [annual] dropout rate is 1%, compared with the systemwide average of 8%. MCAS results are particularly impressive, with 100% of the senior and junior class having passed. The percentage of graduating students going on to a two- or four-year college is 91%. In addition, the staff turnover rate is exceptionally low, with 90% of the faculty renewing their contracts.

Some of this can be attributed to the “start-up effect” of being a new school with all the enthusiasm and visionary zeal that implies. The biggest test will be, of course, how the school performs five years from now when it has passed adolescence and moved into early adulthood. But there are lots of other new schools that haven’t done as well, which suggests that there is something—or several things—special happening at TBA.

One of those special things is the headmaster, Mary Skipper. While the following evaluation points out areas that could be improved, overall our evaluation found Ms. Skipper to be an extraordinary leader with a powerful vision, a deep and inspirational bond with students and staff (and some parents), endless energy, and the entrepreneurial talent to effectively attract and deploy resources. As one student wrote, “She always pushes us to do our best, and makes sure that each and every one of us succeeds. And if somebody falls behind, she has ways of getting help for that student.” Or as a staff member wrote, “Mary is a dynamic leader who inspires her staff on a daily basis. Her passion and commitment for the school, teachers, and students command the same level of passion and commitment from others. It is clear that she cares deeply about our community, and this makes TBA a wonderful community to work and learn in.” Or as a parent wrote, “I don’t think she can get any better than what she is. She is a good headmaster and she should keep doing it.”

The governing board of TBA, speaking for the entire community, considers itself incredibly fortunate to have Ms. Skipper at the head of our school. Given the several transitions that the BPS will be going through over the next several years, we request and recommend that she be made permanent and that her contract be renewed for the maximum three (3) years.

* For the complete TechBoston Academy 2006 principal evaluation, visit: http://www.techbostonacademy.org/departments/govboard_docs.htm
The TechBoston Academy governing board held its first meeting of the 2006–07 school year on October 3, 2006. The following case study describes this meeting and the TBA governing board.*

“This is the year we figure out how to get things done,” Steve Miller, community member and chairperson of the TechBoston Academy (TBA) governing board, declared at its first meeting of the 2006–07 school year. A teacher reflected, “The board has been getting organized, finding its purpose. There is a plan now and action indicators.” Classroom tables were pushed together to form a large rectangle, and a PowerPoint presentation was projected at the front of the room with schedule items and information.

Board members represented a variety of perspectives: TBA administrators, faculty (including a BTU representative), parents, community members, business and foundation leaders, and local government representatives. One look at the ambitious agenda showed that there was indeed a lot to get done, and members around the table were ready to get started.

Last year the board developed a yearly timeline, or “Issues Schedule,” with Amy Bayer, CCE coach. The board revisited the timeline this meeting: issues to work on this year included reviewing the TBA mission statement; evaluating the headmaster and creating a subcommittee for this task; reviewing progress indicators to use for the school; developing finances and fundraising strategies; and revisiting the election-to-work agreement.

Notes from the previous year served as a reminder of what the board had worked on and included some tasks to accomplish in 2006–07:

• The board decided that they should join the faculty at one of their strategy retreats or have their own.

• The headmaster set a goal of creating a $5 million endowment for the school to pay for scholarships and needed supplies.

(continued)
Getting Things Done: The TechBoston Academy Governing Board (continued)

- Information on the governing board would be added to the TBA website, including bylaws, meeting minutes, issues items, list of meeting dates/times/locations, names and contact information for all board members, and a description of the headmaster evaluation process along with each year’s list of headmaster goals.

- The board would examine the current advisory committee membership to see if more people were needed and consider recruitment of people for a TBA 501(c)(3) organization.

- Neighborhood safety was an issue around the school. There was a need for more effective action from the police and more involvement from students and the community. TBA would begin a community service requirement.

  Headmaster Mary Skipper gave a short update on the development of the 501(c)(3). TBA used models from other schools, like Young Achievers, in developing the organization, and school staff met with key people to help get it started. The board brainstormed people to add to the fundraising group, governing board, and advisory committee. As a teacher later stated, “We want to get more community members involved, and we are trying to get more parents to come out.” Names and follow-up action were noted.

  The board requested an update from the headmaster on the opening of the school year. “I really couldn’t have asked for a better opening,” Skipper stated. TBA faculty “did a ton of work over the summer,” and “we have an amazing faculty.” Nods of agreement followed from the TBA administrators and teachers around the table. As a result, “The kids are in the groove. It’s been right from the start.”

  In September the school held a celebration for their excellent MCAS scores. “To see the kids cheering for each other academically and the faculty too, was a great thing.” Ninety-four percent of the class of 2006 is in college, with the vast majority in four-year colleges. Reports from the graduates’ colleges and universities are positive so far, and currently TBA is conducting a longitudinal study of its graduates with the assistance of a local foundation and research university.
The board discussed the election-to-work agreement, with the help of the BTU representative and teacher on the board. The board does not negotiate the agreement, but does approve it and acts as the review board if there is a grievance by a TBA staff member.

After updates and questions, the board refreshed its memory of the TBA mission statement, projected in the PowerPoint presentation. Every year there is a staff retreat at which staff review the mission statement, Skipper explained. “The teachers have a say in what we’re about. The statement has evolved; it’s not the same as when we began,” she noted. A teacher added that this activity aligns with the New England Association of Schools and Colleges (NEASC) accreditation process, which the school was approved for and should continue to consider.

The headmaster continued with the PowerPoint presentation, showing the indicators TBA currently uses in measuring student success towards meeting the mission. Attendance for 2005–06, for example, was 93.3%. Staff attendance was 98%, the highest in the district, translating into staff missing an average of only three days per year. As the headmaster read the MCAS results, a community member commented, “That’s actually astounding [the scores]. You just blow me away.” After seeing all the data, Miller said that the question is how to keep this momentum going. “As a board and as a school, how do we rejuvenate?” he asked. “We must keep a target and find a new way to meet a new challenge.”

Keith Love, director of student leadership and operations, updated the board on how TBA staff is engaging families. The school nearly doubled the number of parents from last year at the September open house to 102, representing 112 students. Thirty-one percent of these were parents who had not attended an open house before. The Parent Site Council is underway. Florence Scott, a parent board member, asked Love about student activities for the year. “She keeps me on track,” he laughed, “with the cell phone calls.” The mother joked, “I’m still waiting for my return call.” In November, there is a meeting for senior parents only, which includes college and financial aid information, along with senior activities. “Parents have our cell phone numbers,” the headmaster said, “and we talk with some weekly.”

Miller opened up the conversation to other indicators of success TBA should report on. He mentioned safety indicators. A staff member
Getting Things Done: The TechBoston Academy Governing Board (continued)

suggested SAT scores, while another suggested the number of students on the honor roll. She wanted to avoid seeing “students sliding through in their classes. We should make classes more high stakes.” An administrator added that grade point averages need to go up as well. TBA has started a peer tutoring center, with 65 students having gone through ten hours of training. The tutoring counts toward their community service requirement. Another board member asked how TBA is staying on the cutting edge of technology. More importantly, how does TBA know that it is succeeding as a school?

Staff were quick to provide stories of success. Bruce Pontbriand, history teacher, described a freshman field trip to the Museum of Science that he coordinated. It was a cold Friday before February vacation, and the school was not providing transportation to the museum, located in a section of the city far from TBA and most students’ homes. Yet, all students immediately turned in their permission slip forms, and only five students did not arrive on time. Five parents or siblings showed up to help chaperone on the trip. “I was astounded,” Pontbriand said. “Not just parents, but siblings took ownership of the school.” The students all completed their assignments, and while other schools experienced behavior problems, “Our students had such cohesion; they were engaged.” The school was welcome back at any time at the museum. “I have been in education for 20 years,” the teacher continued, “and I was truly amazed—it was an outstanding day. This was a key experience of my educational career.”

The headmaster added that whenever anyone visits TBA, they always comment on the strong relationships among students and staff. “It’s an amazing closeness of faculty and students,” she stated. “It’s a feel,” she concluded, and a community member agreed, “It is. It’s a feel.” Love concluded, “I would caution this board about not attaching everything we do to numbers.”

Miller switched the meeting topic to the headmaster evaluation. An extensive evaluation process was created and performed last year. The board recommended to the district that the headmaster’s contract be renewed for the maximum of three years, and the district approved. Miller said he would email the board about forming a subcommittee to begin the evaluation process for this year. “Of all the things this board does, evaluating the principal is the most important,” he stated.
Issues that the board decided to address in its next meeting were scheduling a board retreat or a meeting with the faculty during their retreat and working on the 501(c)(3) organization. The meeting came to a close, and members dissolved into friendly conversations and catching up. Notes with action steps were emailed out the next day.
Q & A with a TechBoston Academy Parent and Governing Board Member

Florence Scott, parent of a 12th-grade student at TechBoston Academy, explains her experiences as a member of the governing board.

Q: What is the perspective you bring to the TBA board?
A: Being on the TBA Board has been an education. My contribution on the board is to be present and available when needed and give my opinion.... I believe that all parents at TBA want to help, if they are asked. Hopefully, TBA will incorporate quarterly Saturdays for parents to volunteer at the school and for fundraising events.

As a parent of a TBA student, my daughter has grown into a loving, respectful young woman who cares about her school and peers. I really appreciate all the work the teachers at TBA invested into her education. I appreciate the leadership of the administration team. I truly appreciate the love and care that is given to the students at this school. My daughter comes home and tells me about her day and what she has learned. She doesn’t come home talking about drama, who [is] selling drugs or who skips school or who had a fight. She comes home talking about her subjects, the highlight of the day, and her classmates and teachers.

Q: What successes and challenges has the board experienced?
A: The board has faced incorporating and putting in place the principal evaluation, and setting up a calendar to address student achievement and the school mission and goals. Safety was also a factor that needed to be addressed. The board will address the library situation in order to create a more structured and fair environment for all three schools [in the Dorchester Education Complex]. The board has also had the challenge of recruiting individuals to be on the TBA board.... The board also conducted a survey for the staff and parents at TBA to find out what was working and what needed to be improved. When these items are presented, I am sure they will be addressed in a positive manner for the enhancement of TBA.

Q: What key decisions have you been part of? What do you want to be part of in the future?
A: One key decision was when the board voted to ask the superintendent to extend Ms. Skipper’s contract to three years at TBA. TBA needed to have the consistent leadership of Ms. Skipper in order to move to the next level of technology education. As far as the future, I would like to be a part of the interviewing process for any of the incoming staff.
The following schedule was created by the TBA governing board with Amy Bayer, CCE coach. It shows the regular annual cycle of issues that need to be addressed by the board.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Fall (Sept.–Nov.)</th>
<th>Winter (Dec.–Feb.)</th>
<th>Spring (Mar.–May)</th>
<th>Summer (June; July/Aug.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>School vision, mission, and policies</td>
<td>Review mission statement and current year’s goals for school.</td>
<td>Check to ensure mission/vision is reflected in implementation of school policies. Check for progress on school goals. Visit the school (see below).</td>
<td>Continue to ensure mission/vision is reflected in implementation of school policies and to look for progress on school goals. Attend the school’s annual student showcase.</td>
<td>Provide feedback and suggestions for next year’s school goals.</td>
</tr>
<tr>
<td>Headmaster evaluation*</td>
<td>Evaluation committee reviews the list of headmaster’s goals for the year as well as the job description and submits them to board for discussion and amendment/approval.</td>
<td>Evaluation committee designs and implements surveys of staff, students, and parents. Committee reviews data submitted by headmaster. Board does a site visit to the school to informally observe how practices (through curriculum and instruction) are aligned with vision. Entire board discusses results of survey and interim data and site visit.</td>
<td>Evaluation committee reviews headmaster’s self-evaluation and writes its own. Board discusses and amends/approves evaluation before it is submitted to BPS.</td>
<td>Following year’s evaluation committee membership is nominated and approved.</td>
</tr>
<tr>
<td>School status reports</td>
<td>Board helps determine which indicators relevant to the school’s mission/vision to use to monitor school’s progress towards academic benchmarks and MCAS goals. These could include: attendance, suspensions, standardized test scores, college acceptances, etc. Hear about the entering class and new faculty.</td>
<td>Receive updates on the chosen indicators to monitor school’s progress on its goals.</td>
<td>Discuss staff needs and hiring process for following year. Discuss what is known about next year’s entering class. Review the data from indicators and reflect on how well the school met its goals for the year.</td>
<td>Attend graduation!</td>
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</tbody>
</table>

* The governing board would also be in charge of the hiring process for a new headmaster. Once they are notified that the current headmaster is leaving, they need to:

- Develop and post an updated job description.
- Establish a selection committee comprised of board members and other members of the school community (chosen at the board’s discretion).
- Create an interview schedule and conduct interviews.
- Choose a suitable candidate through a decision-making method that the whole committee agrees to.
- Submit the name of the selected candidate to the superintendent. The timing of this process would depend on when the board becomes informed of the current headmaster’s departure.
<table>
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<tr>
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<th>Summer (June; July/Aug.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Governing board membership and bylaws</td>
<td>Select parent representatives from entering class (freshmen) and student government leader. Provide orientation to any new board members. Create a contact sheet with board members’ numbers and email addresses.</td>
<td>Review bylaws.</td>
<td>Anticipate future vacancies and ensure selection of replacements.</td>
<td>Establish and distribute meeting schedule for next year.</td>
</tr>
<tr>
<td>Budget and fundraising</td>
<td>Review planned initiatives for the year and share any budget concerns. Brainstorm any new avenues to explore for revenue sources and grant opportunities that are aligned with the mission of the school.</td>
<td>Discuss new initiatives for following year and how budget will cover them. Review and approve budget for following year. <em>(The budget needs to be submitted to the district by Jan. 1.)</em> Follow up on what steps have been taken to secure new grants, contributions, or funding sources.</td>
<td>Discuss current-year spending versus approved budget. Identify any potential budget cuts. Share results of initiatives for securing new revenue and the plans for how those funds will be used.</td>
<td></td>
</tr>
<tr>
<td>Election-to-work agreement</td>
<td>Current-year election-to-work agreement is reviewed. Draft of next year’s work agreement may be shared by teacher reps. on the board.</td>
<td>An update is provided to the board about the negotiation and final completion of the work agreement with staff for the next year. Approve election-to-work agreement and provide to staff.</td>
<td>Board is updated on any staff changes for next school year.</td>
<td>New staff hired are acquainted with the work agreement as part of hiring process.</td>
</tr>
<tr>
<td>Communicate with deputy superintendent</td>
<td>Inform the deputy of board meeting schedule and invite him/her to attend meetings. Share the headmaster evaluation process with the deputy.</td>
<td>Propose that the deputy meet with the board for a “check-in” sometime during the year.</td>
<td>Invite the deputy to the annual student showcase and to graduation. Share successes with the deputy regarding MCAS results, college acceptances, and any other key indicators. Submit the final headmaster evaluation by the deputy’s deadline (usually June 30).</td>
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Getting Started as a Governing Board Member: The Baldwin Early Learning Center

At the Baldwin Early Learning Center (ELC), there is a great emphasis on the role that the board plays in the culture of the school. The board’s role in holding the vision for the school starts at an orientation for new board members.

At 5:30 on a December evening, the principal, two parents, and two teachers gathered around the meeting table to begin learning about their new role at the Baldwin. Dania Vazquez, CCE coach and facilitator of the orientation, opened up the conversation by asking why they became board members. “I’m here because I think this is a wonderful school, and it is a wonderful school for my son. It’s a Pilot School and decisions are made by Graciela [the principal] and others, and I want to be part of making it better for the school,” said one parent. One teacher shared, “My sons go to Young Achievers [a Pilot School]. I am a teacher here, and I want to see the underlying mechanisms of the school.” One of the parents hoped that the role of Pilot School board members is to utilize their different expertise and perspectives in order to help set goals for the school.

The group explored the differences between school site councils and Pilot School governing boards. One of the main differences, they learned, was that in addition to helping to set goals for the school, board members are responsible for looking at data in order to evaluate whether the school achieves its goals. Based on that data, board members also set policy and approve the budget that will support the goals they set. They share accountability with the principal and the staff, and they provide a system of checks and balances for the school. While reading the section in the Boston Pilot Schools Manual on governance autonomy, one of the participants realized “just how important it is to be on the board—board members have a role in the culture of the school—we are the ambassadors, we represent the school inside and out there.”

When asked how to describe the culture of the Baldwin, a teacher said that “it is collaborative: we talk with each other.” One of the parents said,
“As a parent, when I come in, everyone knows my child here.... I don’t see any glitches.” The other parent chimed in, “Teachers and staff are very caring. They really invest in the children — the overall child, not just the ‘school-time’ child. They want to know what is going on for the child at home. People are very accessible, good at communicating.” The meeting continued as different ways of making decisions were discussed: autocratically, by majority, by minority, by silence, by default, and by consensus. The group agreed that while it is more time-consuming, consensus is the best way to make high-impact decisions at the school. Through consensus, they felt, they could better understand an issue and achieve a sense of ownership. They also agreed that if a decision could not be arrived at by consensus, majority vote would rule.

In closing, all participants shared what they learned. The principal noted, “I learned so much. I really like that the board holds the vision and the culture of the school.” The group adopted the quote on the agenda: “Good seeds grow in strong cultures.” Caring about the decisions one makes, protecting what’s important, keeping traditions, celebrating success, and having honest, open communication, were some of the seeds the group agreed should be sown at the Baldwin ELC.
I can’t imagine working anywhere else.
—Sarah White, guidance counselor, Orchard Gardens Pilot School

6: Election-to-Work Agreements

Pilot Schools are given autonomy in order to develop their own unique communities. The underlying principle of election-to-work agreements is that the school community knows what works best for its staff and students. Pilot Schools develop election-to-work agreements that detail the school’s mission, staff and school schedule, professional development calendar, responsibilities, performance evaluation, dispute resolution, and process for releasing faculty.

Through staffing autonomy, Pilot Schools are able to hire and release staff to create a unified school community. All staff voluntarily choose to work in Pilot Schools, and staff select schools based on their own interests and skills. Pilot School teachers are members of the teachers union, and receive the same salary, benefits, and accrual of seniority (in the district) as other BPS teachers. However, work conditions are decided at the school level through the election-to-work agreement, in contrast to other district schools’ work conditions that are decided by the Boston Teachers Union (BTU) contract.

Pilot School staff commit to the school by signing an annual election-to-work agreement, which is approved the previous school year. Agreements are based on input from the school’s staff and approved by the governing board, which includes a minimum of four teachers. Pilot Schools have different processes for soliciting staff feedback prior to bringing a proposed agreement before the governing board for review and approval. Some Pilot Schools set up election-to-work committees, others form a group of teachers that includes BTU representatives to meet with administrators, and others develop the document as a whole staff. Greg Allen, a teacher at
Boston Community Leadership Academy, explained, “All of our decisions are made together and come out of our commitment to the students.”

By mid-January of each year, Pilot School governing boards must approve the election-to-work agreement for the upcoming school year and provide it to staff. To ensure staff support of the agreement, a final opportunity to reassess the approved agreement exists. If a faculty so chooses, it may vote on the approved agreement; a two-thirds vote against the agreement automatically sends it back to the governing board for possible revision.

Critical to crafting a strong election-to-work agreement is creating a process that values the voices of all parties and that meets the needs of students, staff, and administration. The process for developing and approving the agreement must be clear to all. The Pilot Schools Staff Network has examined agreements and decision-making procedures among Pilot Schools over the past two years. Members favored agreements that are clear, specific, and structured. In some agreements, staff questioned vague language and decision-making procedures.

Election-to-work agreements demonstrate the range of ways schools are able to use autonomy to improve themselves. “We can decide to do things differently for our kids and our staff,” explained a teacher at the Gardner Elementary School. For example, schools are able to alter their school schedules to provide more effective conditions for teaching and learning, and create useful staff professional development and retreats. “It’s a learning process no matter how many times you do it,” concluded a New Mission High School governing board member at the Pilot Schools Governing Board Session. After working in a regular district school for decades, Sharon Keyes, a Harbor School student support staff member stated, “I’m now a Pilot advocate. I really see the benefits. We have more learning time, I’m able to know all of my students, and I’m able to connect with my students and the community.”
The following election-to-work agreement guidelines were created by a Pilot Schools committee comprised of school staff, with facilitation by CCE coaches, and approved by the Boston Pilot Schools Network. The guidelines are intended to provide guidance to Pilot Schools in creating election-to-work agreements for Boston Teachers Union members that voluntarily choose to work in a Pilot School.

**BTU Contract Language**

…Pilot Schools will operate with an average school-based per pupil budget, plus a start-up supplement, and will have greatly increased decision-making authority, including exemptions from all Union and School Committee work rules.

…Employees in Pilot Schools will be required to work the full work day/work year as prescribed by the terms of the individual Pilot school proposal. Further, they shall be required to perform and work in accordance with the terms of the individual Pilot school proposal. Nothing in this Agreement shall prevent Pilot School governing bodies from making changes to their programs and schedules during the year.

All BTU members who apply for positions at Pilot Schools shall receive the following information at the time of their application:

- The length of the school day and school year;
- The amount of required time beyond the regular school day;
- Any additional required time during the summer or school vacations; and
- Any other duties or obligations beyond the requirements of the BTU contract.

Employees shall work in Pilot Schools on a voluntary basis and may excess themselves at the end of any school year. No BTU member may be laid off as a result of the existence of Pilot Schools.

The Governing Board of each Pilot school shall develop an internal appeals process to allow any staff member to raise issues, concerns, or problems. The internal appeals process shall be submitted to the Joint BTU/BPS Steering Committee for approval. The internal appeals process shall be provided in writing to all BTU staff members.

Issues not resolved at the school level may go to mediation under Article X-C of this agreement. Final resolution will be made by the Superintendent of Schools and the President of the Boston Teachers Union.

(continued)
Pilot School Work Rules and Grievances

As stated in the BTU contract, Pilot Schools are exempt from all union and school committee work rules—rules regarding most terms and conditions of employment. BTU Pilot School staff are required to work the full work day/work year, and perform and work in accordance with the terms set forth by each individual Pilot School. Further, Pilot School governing bodies may change the school’s programs and schedules during the year, in consultation with staff. (For example, if a schedule is not working in a school’s first semester, the board may vote to change it in the school’s second semester.)

BTU Pilot School employees work at their respective Pilot School voluntarily. Therefore, permanent teachers may voluntarily excess themselves at the end of any school year. Notice must be given according to district guidelines. Similarly, a Pilot School may also choose to excess an employee at the end of any school year (the deadline for notification of a permanent employee to be excessed is set each year). In this case, a permanent employee does not lose his/her right to employment within the BPS. He/she is placed on the systemwide excess list (this does not apply to provisional teachers).

Because Pilot Schools determine their own work conditions, they create their own dispute resolution processes separate from the formal grievance procedures within the BTU contract. Each Pilot School is required to have in place an approved appeals process to allow any staff member to raise issues, problems, or concerns.

Notification of Pilot School Work Rules during the Hiring Process

Each Pilot School should include in its hiring process notification to the prospective staff person that Pilot Schools are exempt from all BTU union and school committee work rules. This explanation should include a description of the Pilot School’s work day/work year and schedules, and the person’s potential job responsibilities.

(continued)
Election Agreements

When hired and annually thereafter, each BTU Pilot School staff person should be required to sign an election agreement (see the tool “Election-to Work Agreement Sample Template”). This election agreement should outline:

- Salary, benefits, seniority (related to salary only), and membership in a bargaining unit.
- Terms of employment, including BPS zero tolerance policy for discrimination and harassment.
- Length of school day and school year, including the amount of time required beyond the BTU contract day and any additional required time during the summer or school vacations.
- Job responsibilities, including any duties or obligations beyond the requirements of the BTU contract.
- Performance evaluation.
- Dispute resolution.
- Excessing for permanent employees.
- Dismissal (this is governed by state statute).

For provisional teachers, the Pilot School should attach the standard BPS contract to this election agreement, with the language amended to parallel that of the election agreement.

Performance Evaluation

Every Pilot School should have an approved, written process for performance evaluation of staff. This document should clearly articulate the process by which staff will be evaluated, how often they will be evaluated, the criteria by which they will be evaluated, and the support and professional development teachers can expect to receive. The document should also include the process by which the school will work with teachers that need improvement.
The following is a template for an annual election-to-work agreement that school staff elect to sign at each Pilot School, outlining the work conditions for the school year. The agreement should include the following information.

1) Introduction
Include the following language:

I, First Name and Last Name, am voluntarily electing to work at Name of School, Pilot School. I am signing this Election Agreement to indicate I understand and agree to the following terms and conditions of my employment.

Pilot School is under the Pilot Schools program described in the Collective Bargaining Agreement between the School Committee of the City of Boston and the Boston Teachers Union (the BTU Contract) and in the Pilot Schools Request for Proposals. Employees of Pilot Schools are to receive wages and benefits as they would at any other Boston Public School, as specified in Article VIII, Compensation and Benefits, of the BTU Contract for teachers. Other terms and conditions of employment will be determined by Pilot School and Pilot School’s governing body, rather than by the BTU Contract. While not attempting to be exhaustive, this election states the more important terms and conditions. These terms and conditions will be subject to change from time to time as the Pilot School may make changes to its program and schedule during the year.

2) Salary, benefits, seniority, and membership in a bargaining unit
Include the following language:

You will continue to accrue seniority as you would if you were working elsewhere in the Boston Public Schools. If you are hired as a teacher, you will receive the salary and benefits established in the BTU Contract, Article VIII. You will be a member of the appropriate Boston Teachers Union bargaining unit. (Note: No seniority accrues until and unless the teacher is made permanent, and then seniority is retroactive.)

3) Terms of employment
• Outline work day and work year.
• Include school schedule.
• The following language should be included at the end of this section:

In addition, supplemental hours and tasks necessary to complete the mission of the Pilot School may be required.

4) Responsibilities
• Outline all job responsibilities.
• Include the following language at the end of this section:

Other duties as assigned by the Administrator.

(continued)
5) **Performance evaluation**
Include the Pilot School’s performance evaluation process.

6) **Dispute resolution**
Include the school’s dispute resolution process, using the Pilot School Network dispute resolution guidelines as a resource.

7) **Excessing**
The following language should be included:

> For permanent teachers, you may unilaterally excess yourself from _______. Pilot School within the Voluntary Excess timeline set forth in the annual BPS Staffing Calendar included in Superintendent Circular HRS-25. Similarly, _______ Pilot School may unilaterally excess you within the Involuntary Excess timeline set forth in the annual BPS Staffing Calendar included in Superintendent Circular HRS-25. In the event of such excessing, permanent teachers will be placed on the system-wide excess list, subject to the terms and procedures in Part V. K of the BTU Contract.

8) **Dismissal**
The following language should be included:

> You will be subject to dismissal from BPS in accordance with existing law. Additionally, the contract for provisional teachers is limited to one school year of employment.

9) **Signatures**
The following language should be included:

> By signing this document, I acknowledge that I have read all the provisions of this election agreement and that I agree to all its terms.

This should be followed by the date, name and address of the employee, and name of the Pilot School director.
As required by the BTU contract, every Pilot School must have a process for dispute resolution that is approved by the school’s governing body in case a dispute arises between an employee(s) and administration. Following are recommended guidelines for schools developing a dispute resolution policy.

**Work Rules**

1. The teacher should meet with the Pilot School administrator to address concerns about the school’s work rules and attempt to reach a resolution. It is always advisable to document the results of such meetings. In doing so, the teacher should have the opportunity to bring another colleague to the meeting for support and advice. All meetings regarding disputes should be kept confidential by the administrator.

2. If a meeting with the administrator does not result in a satisfactory resolution, the teacher may choose to present the concern or complaint to the chairperson of the school’s governing body. Every Pilot School governing body should have in place a process to hear the concern or complaint, either by a subcommittee of the governing body or through accessing outside mediation. The decision of the governing body in relation to the concern or complaint is final, unless appealed through step 3.

3. If the teacher is still not satisfied, he/she may appeal to the superintendent and Boston Teachers Union president. The decision of the superintendent and BTU president is final.

**Equity Issues**

1. A teacher with concerns about equity issues at the school—for example, regarding issues of race, gender, religion, sexual preference, or fairness—may choose to meet with the Pilot School administrator to address them and attempt to reach a resolution. In doing so, the teacher should have the opportunity to bring another colleague to the meeting for support and advice. All meetings regarding disputes should be kept confidential by the administrator.

2. Pilot School staff should be made aware, through the school’s election agreement or employee handbook, that they may bring an equity dispute to the Equity Office of the Boston Public Schools. This office is charged with investigating the equity dispute and mediating a resolution.

3. Pilot School staff should be made aware, through the school’s election agreement or employee handbook, that they may bring the equity dispute to the Massachusetts Commission Against Discrimination. This office is charged with investigating the equity dispute and determining a resolution.

While Pilot School faculty are not subject to union and school committee work rules, a staff person who is a BTU member is still a bargaining unit member.
Building Equitable and Empowering Work Agreements

The following vignette is based on the workshop “Building Equitable and Empowering Work Agreements,” designed by Connie Borab with Alison Hramiec, teachers at Boston Day and Evening Academy.

Everyone in the community wins when staff and administrators negotiating election-to-work agreements come together as colleagues with a common purpose: to create a livable and sustainable agreement that empowers all staff and administrators to realize, over time, the school’s individual mission and that puts student learning at the center of the agreement.5

The workshop “Building Equitable and Empowering Work Agreements” offers ten principles based on the Coalition of Essential Schools (CES) principles that serve as guidelines when negotiating a work agreement in a Pilot School or Horace Mann charter school, many of which are aligned with CES principles. Connie Borab and Alison Hramiec, teachers at Boston Day and Evening Academy, suggest that the opening section of an election-to-work agreement should include the school’s mission statement, an explanation of the school’s unique Pilot pedagogy, the purpose of the agreement, and the school’s priorities for the year. Including this information is important to enabling each staff person to decide whether his or her philosophy and beliefs fit with the mission of the particular Pilot School.

Work conditions, job descriptions, a dispute resolution process, and other details are to be included in the body of the work agreement. Questions to consider are: What are the tasks required in the job description? Are they grounded in the prioritized vision/goals? Across Pilot Schools, the agreements will vary, because “one size doesn’t fit all,” according to Borab.

(continued)
Building Equitable and Empowering Work Agreements (continued)

During discussions both staff and administration must realize that, “rather than trying to get something for you, it’s for the students.” It is recommended that at least 15% of the schedule for the week be devoted to teacher prep time. “It allows us to create a work time that everyone needs, but doesn’t lock us into the union. It allows for flexibility.” An election-to-work agreement committee is “causing good conversation” at Boston Day and Evening Academy, according to Borab and Hramiec. The committee consists of three day faculty, two evening faculty, and the principal.

As all Pilot Schools annually develop election-to-work agreements, staff and administration must agree to create a mutually negotiated contract that puts student learning at the center. In such agreements, everyone wins.
Change is very people dependent, and if it only happens at one level of the organization, it doesn’t happen. In education we are all shareholders.

—Mary Skipper, principal, TechBoston Academy

**Conclusion**

These are challenging times to be an educator. The stakes are increasingly high and public for students, teachers, and principals. The Pilot School framework offers a strategy for transforming schools so that all students achieve at high levels, but it will succeed only if all members of a school collaborate to make it happen.

In this guide we have laid the groundwork for establishing an effective approach to leadership and governance that is centered on those closest to students — staff, families, and community members. There are a few core ideas or actions that unify the tools, case studies, and vignettes featured in this guide:

- Begin by setting a clear mission and vision that expresses the school’s central purpose and focus. Revisit the mission and vision regularly.

- Establish and nurture a strong professional collaborative culture, both by establishing time and structures, and by guiding staff in using them well.

- Define leadership roles broadly and ensure that staff, families, and students take part in guiding the school toward its mission and vision.

- Organize leadership and governance bodies so that they can work effectively. The little things — agendas, minutes, follow-up, regular communication — are important.

The Pilot School principal plays a critical role in initiating and sustaining these actions. Effective shared leadership depends on the coordination and guidance of a strong leader — one who can recognize and encourage the leadership potential of others.

“I’m now a Pilot advocate. I really see the benefits. We have more learning time, I’m able to know all of my students, and I’m able to connect with my students and the community.”

—Sharon Keyes, support staff, Harbor School
The purpose of the Pilot School framework is to create vibrant learning communities engaged in the continuous improvement of teaching and learning. Autonomy gives Pilot Schools the power to shape their resources. Leadership, professional collaboration, and governance are the means by which they can use this power to support the learning and achievement of all of their students. As Peggy Kemp, principal of Fenway High School, said, “There’s an opportunity to be continually evolving and reassessing. What’s the best direction that we should be moving in? What are we doing well? What can we do better? And yes, we can find a way to make it better if we all work together.”