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JAMES E. AUSTIN
ALLEN S. GROSSMAN
ROBERT B. SCHWARTZ
JENNIFER M. SUESSE

Managing at Scale in the Long Beach Unified School District

Superintendent Holly Evans was worried. Six months after accepting the top post at a large urban public school district, Evans recognized that the district's central office was not functioning at a high level. She knew that the district office could do more to address the wide variation in student outcomes across the schools in her district. Evans wondered how to achieve high performance at all the sites despite differing leadership and staff capacities, governance structures (e.g., charter schools), and student demographics. She had discussed her plans to implement a substantial reorganization at the end of the school year with the school board and had their support, but she had not yet identified what to do. To help her develop an approach, Evans decided to visit a few districts around the country to see how they were organized and managed. Her first stop was the third-largest school district in California: the Long Beach Unified School District.

District Structure

Students and Schools

Evans learned that in 2005–2006, the Long Beach Unified School District (LBUSD) served more than 92,000 students (see **Exhibit 1** for district enrollment, 1996–2006). Within LBUSD, neighborhoods varied widely from the elegant homes along the ocean to the tightly packed downtown area. Typical of southern California, the student body represented diverse backgrounds and socioeconomic status. Fifty percent of students were Hispanic, 18% were African-American, 17% were white, 9% were Asian, and 6% were Filipino and Pacific Islander. Sixty-six percent of the students qualified for free or reduced-price meals, 26% were learning English, and 8% required special education services.

The district operated 91 schools including 61 elementary schools; 15 middle schools; 6 large, comprehensive high schools; 3 smaller high schools; a K-12 school; and 5 alternative sites. Parents

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Professors James E. Austin, Allen S. Grossman, and Robert B. Schwartz and Research Associate Jennifer M. Suesse prepared this case. Some names and situations are disguised, and Holly Evans is a fictitious character. PELP cases are developed solely as the basis for class discussion. Cases are not intended to serve as endorsements, sources of primary data, or illustrations of effective or ineffective management.

were free to enroll their children in any school of their choice, although the student assignment formula did include a slight neighborhood preference.

LBUSD employed the equivalent of 4,431 full-time teaching staff in 2004–2005. The average teacher had been in the district for 10.2 years, had 12.3 years of experience, and 90.8% had their full credentials. New hires accounted for 6.5% of the teaching staff and tended to balance retirements. These averages had remained fairly consistent since 1998. The average teacher's salary was $57, 051, as compared with $57,294 statewide.[1]

The district's performance, as measured by California's Academic Performance Index (API), showed consistent growth. Although the means used to calculate API scores changed each year (making longitudinal comparisons difficult), the figure was designed to measure academic performance and growth of schools and was based on a variety of indicators.[2] API scores ranged from 200 to 1,000, and the statewide target was 800. LBUSD's base API score in 2005 was 713, which was the fourth highest in the state among the largest districts (see **Exhibit 2** for a statewide demographic and API comparison chart and **Exhibits 3, 4,** and **5** for a summary of individual LBUSD school API scores).

The California Department of Education also ranked schools in the state using an alternative process that compared one school with 100 others with similar demographic characteristics, levels, and predicted API scores. This "similar schools rank" was awarded by dividing this comparison group into 10 categories of equal size, called deciles, and ranking them from one (lowest) to 10 (highest). In 1999, 6% of LBUSD schools were ranked 1–3 (lowest), 34% were ranked 4–7 (average), and 60% were ranked 8–10 (highest). By 2005, 13% of LBUSD schools had 1–3 ranks, 32% ranked average, and 56% had the highest scores.

Evans saw that the district, like others across the nation, was wrestling with a persistent achievement gap between white and Asian students on one hand and Hispanic and African-American students on the other (see **Exhibit 6** for an overview of the district's achievement gap).

Elementary and middle school sites were led by a single principal. At the high school level, LBUSD had employed coprincipals in its six large high schools since the mid-1990s. Contrary to the small-school trend taking hold in some large urban districts, LBUSD remained committed to these six comprehensive high schools, which had average enrollments of 4,000 students each. Co-principals shared full responsibility for both operational and instructional leadership activities at their sites. Each pair decided how to divide these tasks between the two of them according to their individual strengths and preferences.

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[1] Teacher demographics cited on the Education Data Partnership website: www.ed-data.k12.ca.us.

[2] According to the California Department of Education, a school's score on the API is an indicator of a school's performance level. The statewide API performance target for all schools is 800. The baseline score summarizes the starting point of performance, and a school's growth is measured by how well it is moving toward or past that goal. A school's API base is subtracted from its API growth to determine how much the school improved in a year. The API score summarizes the results of various indicators from the state's Standardized Testing and Reporting (STAR) program including the California Standards Tests (CST) in subject areas, the norm-referenced California Achievement Test (CAT/6), and the California High School Exit Examination (CAHSEE). Statewide test results are incorporated into the API calculation according to the amount of weight, or emphasis, given to each test. Each school's content area weights are determined based on test weights established by the state and on the number of valid test scores in each content area and grade level at a school. API calculations result in content area weights that may be slightly different for each individual school. In addition, APIs are calculated for numerically significant student subgroups at a school to ascertain whether the school meets the "comparable improvement" criterion. For more detail, see http://www.cde.ca.gov/ta/ac/ap/apidescription.asp.

Discretion over staffing and budgets was the same for all 91 schools. Of every school's general fund budget, 85% went to personnel. Principals had discretion as to how to spend the additional 15% of their general fund allocation. Also, due to federal funding grants and restrictions, schools with a greater percentage of English Language Learners or impoverished students received additional funding according to their individual student demographics. Principals had discretion over how to spend these funds as well. Each site could decide whether or not to allocate a portion of its school's budget for an assistant principal, and most did. Principals could select their assistant principals from a district-approved list of candidates and had the authority to hire teachers for any available slots following the district's transfer and assignment process required by collective bargaining agreements.

School administrators were commonly rotated across sites and levels. While elementary school principals had not often worked at other levels, the majority of high school principals had previously been elementary or middle school principals and had long tenures in the district. Principals also moved in and out of administrative roles in the central office. Although this "rotation policy" was unstated and informal, all principals expected that their assignments at a particular school would last only five to eight years.

At the elementary school level, the district used the state-mandated Open Court curriculum in literacy and Houghton Mifflin curriculum for math across all sites. A variety of curricula were designated for middle and high school academic programs. Sites were permitted to supplement designated curriculum with additional materials, and some of the comprehensive high schools had organized themselves into small learning communities (SLCs), where teachers selected curriculum based upon both state standards and SLC-related themes. The district leadership encouraged the wide variation in themes and implementation of SLCs that existed across high schools.

District Organization and Focus

Evans met the leadership team upon her arrival in Long Beach. Superintendent Christopher Steinhauser had led the district since 2002, having previously served as the deputy superintendent, an elementary school principal, teacher, and teacher's aide during his 24 years in the district. As did those of many district administrators, both of Steinhauser's children attended LBUSD schools. Evans learned that prior to 1992 the district had been organized into three geographic areas and was fairly decentralized. Superintendent Carl Cohn reorganized the district into levels, sought to establish a service mentality and structures for collaboration at the central office, and hired a mix of insiders and outsiders for key positions. The central office was divided into two units: instruction and support services (see **Exhibit 7** for an organizational chart). In order to create a district-wide approach to education for each age group, the instructional side was arranged by level: Deputy Superintendent Karen DeVries supervised elementary schools, Assistant Superintendent Gwen Mathews supervised middle schools and Head Start programs, and Assistant Superintendent Margaret "Maggie" Webster supervised high schools. Centralized support services, including finance, curriculum, human resources, research, and special education, were organized functionally. These departments worked to collaborate with each other and with the schools. Dr. Lynn Winters, assistant superintendent of Research, Planning and Evaluation, commented:

> Our primary function at the central office is to support the schools and focus on our students. The superintendent prior to Carl Cohn [who led the district from 1992 to 2002] pretty much dismantled the central office functions. Carl realized the importance of central office support and began rebuilding services to support instruction. He reinstituted curriculum and staff development and made it a cabinet-level position; he reconceptualized the role of research, taking all of the "accounting" functions from this office and allowing us to do real evaluation; and he hired a special education leader who was nationally recognized as a

> visionary. Today, the "old-school" central office structures and ways of working are replaced by a team approach. We work together with openness and mutual trust. Sometimes collaboration can be difficult, especially when resources are limited, but we know that we have to sort out our differences to ensure the best solutions for kids.

Centralized support and funding were allocated according to district priorities. Schools that were struggling (designated program improvement or state high-priority schools) received more state and federal resources than their more successful counterparts. These schools also received extra attention and coaching from district personnel. However, no matter what the overall performance of a school, the central office attempted to respond to any specific request or concern. DeVries, Mathews, and Webster worked with the department heads to solve problems and allocate resources, and they would request support services for specific sites when needs that could not be addressed by the school's staff were identified.

High Schools

Under Cohn's leadership, the district focused much of its attention and resources on improving the educational quality of its K-8 offerings in order to better prepare students to succeed in high school. In 2002, LBUSD decided to address high school reform more explicitly. High school administrators developed a detailed "high school initiative" that sought to address four broad strands of reform:

- Increase achievement of all students in the academic content areas.
- Close the achievement gap by accelerating the learning of the lowest-performing students.
- Improve high school climate and culture among students and staff to support improved achievement.
- Build high school leadership capacity to design, implement, and sustain reform and improvement efforts.[3]

These goals were consistent with reform work taking place at all levels of the district and built on the work of the previous decade. The strategies for high school reform reflected widely held district beliefs about how to work for lasting change (see **Exhibit 8** for a list of reform strategies). Each high school principal was given funds to engage teacher leadership in this reform work at their sites. Each site defined how they would implement these reforms and had the discretion to decide who would participate and in what ways.

In addition to high school reform, elementary, middle, and high schools had plans in place to help more struggling minority students achieve proficiency. District administrators acknowledged that their work in addressing the achievement gap was lagging, but they were determined to help all kids succeed.

When they were not responding to specific requests from the assistant superintendents, the district's support services were focused on the high school initiative. Although support and resources were still available on an as-needed basis, elementary and middle schools received less attention and support from the central office than they had in the preceding decade.

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[3] A full description of the high school initiative "Every Student, Every Day: Responding to the Needs of All Learners" can be downloaded at http://www.lbusd.k12.ca.us/district/departments/high_school/initiative.asp.

Budget

Fiscally independent of the city of Long Beach, the district, on average, had received 13% of its revenue from local sources, 76% from the state of California, and 11% from federal grants and programs over the preceding 10 years. The district was currently experiencing the effects of a statewide fiscal crisis, which necessitated deep budget cuts for LBUSD. Declining enrollment also contributed to the district's financial pressure (see **Exhibit 1**). From 2002 to 2006, Steinhauser estimated that "we cut close to $50 million, including 24 central office positions." The district's total budget in 2005–2006 was a little more than $912 million from all sources (see **Exhibit 9** for district financials). Steinhauser said:

> Cutting that much from the budget was very difficult, but we worked with all our stakeholders to underscore the importance of preserving classroom instruction. We believe that kids must come first, so their classrooms had priority as we faced tough decisions. Even though maintaining a low teacher-to-student ratio is very expensive, changing it was not on the table. We believe strongly that the 20–1 ratio in K-3 has been a huge benefit to the system, so we found other ways to fund it using some categorical money.

Assistant Superintendent Christine Dominguez, who supervised the Office of Curriculum, Instruction, and Professional Development, added:

> We wanted to avoid layoffs and protect the school sites. Chris brought in an advisory group and led discussions to get input from the community. He listened to the central office, even though we took huge cuts. Our goal is to just continue the improvement efforts. The worst-case scenario would be destroying the work we've done here. We had to keep finding ways to do more with less.

By freezing central office hires and consolidating positions, the central office shrank considerably, which resulted in heavy workloads and reduced staffing for the remaining leadership. Evans considered just how many central office positions could be consolidated before the leadership roles became unmanageable. She noted that DeVries and Winters planned to retire in August 2006, and the district anticipated a few high school principal retirements. Knowing the challenges of ensuring seamless succession, especially in such critical roles, Evans wondered if the next generation of district leadership was ready. Many of Steinhauser's recent hires to the district leadership team, especially in support positions, had strong elementary school backgrounds, and some secondary school administrators expressed concerns that there was a lack of understanding of the needs of older children and high schools in particular. Evans recognized that the district was facing hard choices. She wondered how the district would weather the continued financial strain presented by declining enrollments and the ongoing state budget debate in California.

Governance and Collective Bargaining

A five-member board of education governed LBUSD, set district policy, and approved the budget. Each member represented one of five regions of Long Beach. Although the regions had different characteristics and the poorest residents tended to be concentrated in the southwest section of the city, board practice encouraged members to act on behalf of "all kids," regardless of their neighborhood. After a decade of fairly stable board membership, there had been some turnover since 2002.

In speaking with district administrators, Evans learned that many were worried about the increase in unrest around the district promoted by the union. Long Beach had a history of cordial

union-district relations, but confrontations with the current union leadership (many of whom were not native to LBUSD) had taken an uglier tone in the past few years, and the staff was unsettled. In the spring 2006 board elections, the Teacher's Association of Long Beach (TALB) endorsed three candidates to challenge the three incumbents up for reelection. One challenger won, one lost, and one was seated in the June runoff election.

Accountability System

Principal Perspectives

Evans spoke next with district leadership about their accountability system. She began by meeting with a focus group of principals from all levels, which included a mix of experienced and novice administrators serving at both high- and low-performing schools. Evans asked the principals to discuss their assignments and the expectations placed on them by the district.

An experienced elementary school principal answered first. "This is a results-driven district," she said. "Everyone encourages us to have high standards, and the people who work here are friendly. Our supervisors are nurturing and also push us. They work right along with us." Evans saw nods all around the room. Principal Alejandro "Alex" Flores, who was in his fourth year at Wilson Classical High School, spoke next: "I came to Long Beach from another district, and immediately I saw that they have a totally different way of doing things. It is much more collaborative, and there is a real emphasis on instruction. Maggie holds us accountable. Some people may resent that, but I know it's not about her. It's about kids." "The pressure for results is felt everywhere," added a third principal. "The higher-achieving schools on our East Side have to figure out how to maintain high achievement. The schools downtown and on the West Side are expected to push the academic agenda forward. Nobody has an easy ride."

An elementary school principal chimed in, "With our rotation policy, we expect we could be asked to lead any school in the district, and we hear about the different challenges each site presents. Most of us have worked all over Long Beach." Another principal said, "There are different explanations for why they move us around so much. I think they feel that once you get to a certain point in a school, you're prone to coast, so they move you again so you have to reestablish yourself and get out of your comfort zone." "My father, a former principal, used to say that the reason they moved principals around was so you couldn't create a fiefdom," a middle school principal added. "I think that it gets harder to demand improvement if you know the staff too well," commented an elementary school principal. "I mean, you know their strengths and their weaknesses . . . but they also know yours. I'm in my third school, and I like getting a clean slate every five years or so." A high school principal noted: "Principals don't always have much of a voice in deciding when or where they get to move, and that can cause some tension. Sometimes the district makes last-minute changes, and you find out that you have a new assignment right at the end of the summer. Then, there's no chance for goodbyes, for notification, and no time for closure with the old staff."

A middle school principal, whose school had recently been awarded the prestigious California Blue Ribbon, said, "I know I can be moved from my site at a moment's notice, so I travel light. I never have more than two boxes of personal items in my office—that's all I can carry." Another principal noted, "While the district does a decent job of placing people, they make mistakes. If someone is not working out, they don't usually last more than a year or two."

"During my first year at Edison, our API went down six points," said Mathilde "Matty" Zamora, the principal at Edison Elementary School. "Karen provided support by assigning a math coach who facilitated the implementation of a math facts program and an alternate math pacing program." Zamora and her team's efforts paid off. In 2005, the school's API score rose 88 points. In 2006, Edison was selected as a California Distinguished School, the state's top award. "We are recommending our approach to teaching math facts to others in the district," Zamora added. "It worked with our students, 100% of whom qualify for free or reduced lunch, and 76% are second-language learners. A number of my colleagues have already visited the school to see what they can take back to their sites."

"We meet with department heads, curriculum heads, and our coaching staff to determine the weak and strong areas," said one middle school principal. "We talk about what we need to do, and then I meet with the head of middle schools to learn about how this fits into the district's goals for the year. Our annual goal-setting is a collaborative process between the site and the central office which is revisited throughout the year." "Since we don't have departments, it's a little less complex at the elementary level," said a veteran elementary school principal. "I do more of the needs assessment on my own or in conversation with a few lead teachers. But, the basic structure is the same, and in my annual conversation with Karen we review my progress and goals."

"The expectation of continuous improvement is the same districtwide," added district veteran Rosalind "Roz" Morgan, who was a principal at Jordan High School. She continued: "There is a friendly competition among the high schools, and we know that all of the jobs are hard. We are all expected to be instructional leaders. This has been a major change in the last decade, and so we help each other out wherever we can. Sometimes I wake up in the middle of the night thinking about my data and how we're going to address the needs of all our kids."

Other principals echoed the importance of using data to inform site-based decision making. "We all live by the data," said an elementary school principal, "because that's how we know what's working." Flores added, "The data folks in Lynn's shop are great. She and her team work with us to provide the information and analytic tools we need to analyze our student-achievement results."

The principals then recalled an incident the preceding year, when test scores at a high-performing school on the East Side fell: "As soon as the scores were published, that principal got a bunch of phone calls from other principals wanting to know what had happened and what they could do to help."

"We also rely heavily on the district curriculum staff to provide high-quality products," said a middle school principal. "Some of us struggle more with human resources," confessed one principal. "They aren't always as responsive as we'd wish." "We talk among ourselves," said a veteran principal. "We work together to make sure things happen." Another concluded:

> You have to have a certain personality to do this job, since it takes blood, sweat, and a lot of tears to succeed. The district works hard to ensure that there is a good fit between the leader and the school, and they work to support us, but we have the responsibility for our schools at the end of the day. It's our job to establish working relationships and trust with the teachers, the parents, and the students and to keep everyone focused on the kids.

District Management Philosophy for School Leadership

After meeting with the principals, Evans asked their supervisors—DeVries, Mathews, and Webster—more about their management philosophy and practices. She learned that all three leaders

conducted both formative and summative evaluations of their administrators, and each had a system for annual planning with each site. Overall, it seemed that LBUSD encouraged a variety of management styles according to the strengths and weaknesses of the different leaders as long as results were achieved. Evans met with each leader, then followed up with a group discussion. Evans, who was aware of her own challenge in diversifying her senior staff, noted that both Mathews and Webster were African-American and native to Long Beach, while DeVries had moved to California from Utah and was white. Evans began by asking DeVries, Mathews, and Webster to reflect on their individual roles, their expectations for principals and instructional staff, and how their philosophy of management had evolved over time.

Karen DeVries: Elementary Schools

I moved to Long Beach and joined LBUSD in 1980. I had a variety of teaching and leadership roles, mostly in elementary schools, before joining the supervisory team in 1996. Initially, I was responsible for supervising 23 schools. Then, budget cuts in 1999 necessitated a reorganization, at which point I assumed responsibility for all 52 LBUSD elementary schools. I became deputy in 2004, and I plan to retire in August 2006.

Everything starts with the data. I love the data, not because I'm a numbers freak, but because it's the way to talk about things. It's not emotional. It just speaks for itself. Because we all have access to it, the monitoring of student progress, especially for our lowest-performing kids, is available at all times. Visiting schools, walking into classrooms, yields more data. I also talk with principals and meet with teachers. If a school is struggling, we focus on interventions. Data doesn't matter unless you talk about how you're going to address the problems it reveals. The most important step in data analysis is making changes in instructional practice in the classroom. I work with principals who are as impatient as I am and have the expectation that we hold ourselves and our teaching staff accountable for results. If student achievement results aren't realized, additional attention is given to schools that are not making progress. If those efforts don't begin to have an effect, then I take more drastic steps. We all know when someone isn't doing their job. I think people respect that I won't tolerate lack of effort. I expect principals to do something about teachers who aren't doing their jobs, so I darn well better be doing something about principals who aren't doing their job. Sound instructional leadership and the ability to develop "followership" is critical. If you can't lead so that children have every opportunity to learn, there isn't a place for you in LBUSD.

Our district has a tremendous history with using an approach called "elements of effective instruction" [EEEI], which evolved from Madeline Hunter's lesson design [see **Exhibit 10** for an outline of EEEI principles]. You have to know how to teach—how you're framing the learning, what process you'll use to explain it, how you'll motivate learners and give feedback. Our belief is that it doesn't matter what the teacher knows, it's what the kids learn. It is the teacher's responsibility to find out how their teaching impacts student learning. I expect that principals use EEEI in their evaluations of teachers, and I use it in my evaluations of them. Using data and implementing the EEEI pedagogy are paramount, even sacred. They are not up for discussion. In my mind, this is where the principals' work is most important. We need to keep asking, "Would I put my kid in that classroom?"

It's critical to establish trust and build the day-to-day relationships necessary to get the work done. Relationships are fragile. They are the hardest to build, and the first to go. In our annual reviews, I talk with principals about the importance of their relationships with their staff and community and also with each other. People don't trust easily, so I am careful to establish a culture where trustworthiness as well as instructionally competent principals can flourish.

I expect all schools to improve, no matter whether their level of achievement is high or low. However, no one person is out there by themselves. I can't stand it when there's no ownership by all of us for the issues that we all need to face to keep student achievement high. That has been tough during all of these budget cuts. Last year, as I started to get overloaded with the addition of the deputy superintendent role, I made up my mind that my contribution would be to keep things running as smoothly and as consistently through this hard time as I could. One way I began to share the load was by identifying 12 principal leaders, who started running our key-results meetings with other principals. I'd been working with them for six years, so they knew how those meetings should go. To watch them take on this additional responsibility was inspiring.

Gwen Mathews: Middle Schools, K-8 Schools, and Head Start Programs

I became an assistant superintendent in January 2005. Previously, I supervised the district's Head Start programs, and I am currently supervising the directors of both the Head Start and preschool programs as well as serving as assistant superintendent. Prior to joining the central office leadership team, I was a principal in three elementary schools, as well as a teacher, a specialist, and a facilitator.

When I got this job, I started by having conversations with my predecessor and doing research on the middle and K-8 schools. I invited several principals out to dinner and tried to get a feel for how they were thinking about what needed to be done to promote academic achievement in middle and K-8 schools. I engaged other principals in informal conversations as well. I knew many of them because I had worked in the district for 34 years, but I wanted to meet and get to know all of them.

I think they were pleased with the middle school reform movement, which began in the mid-1990s, and my goal was to take them to the next step—by examining effective practices, refining those practices in need of improvement, and identifying and implementing new concepts and practices. I actually shared ideas with Lynn Winters, who's a good sounding board and extremely knowledgeable about data. I basically asked questions so I could get a feel for where we were and where we needed to go.

I see my role as providing leadership and supporting the principals, who in turn provide leadership to their schools for raising the academic achievement levels of our students. Before the year begins, I review the superintendent's goals and develop goals for middle and K-8 schools. I assist principals in establishing goals for their schools. I expect them all to learn, grow, and to meet the goals we set, which are basically in five areas:

- Data-driven instructional planning,
- Comprehensive, schoolwide literacy,
- Safe and orderly schools,
- Focused interventions to meet the needs of students at the far below- and below-basic levels and with low grade point averages, and
- Professional development.

I hold performance accountability conferences three times a year in addition to visiting schools. I think the principals understand that we will discuss issues as they arise, establish and identify areas to be improved, and share information. At the same time, principals know

there are some major decisions made at the district level. When possible, we will seek to involve them before decisions are made. We also encourage site-based decision making and give schools a great deal of autonomy to do what they need to do to achieve results. Principals and their school-based site councils make decisions about how discretionary funds will be spent.[4]

Maggie Webster: High Schools

This is my 35th year in the district, and my fifth as an assistant superintendent. I began as a junior high school English teacher before moving into high schools. I worked on human relations strategies when the district experienced racial tensions in the 1970s and early 1980s before becoming a high school counselor, assistant principal, and then was part of the first shared principalship at Polytechnic [Poly] High School in the early 1990s. Sharing responsibility for the instructional leadership at a campus with more than 4,000 students is the only way we can make the job manageable. It is tricky to pair people who can work together, but we believe it is worth it. Not only can coprincipals distribute leadership, but there is always an administrator on campus when the other is off-site.

We're in the fifth year of our current high school reform effort, which is focused on instruction. It implements a coherent, standards-based curriculum and instructional program; uses assessment data to improve instruction and achievement; provides available district instructional resources necessary to move student achievement forward; and is strongly based on professional development.

When I took this position five years ago, we sat down together, and I gave principals some brutal facts. Our high schools were not moving, we were not seeing success, and our students were not achieving as they should have been. I said this was our fault, and we needed to do something. There weren't really models for success at big, urban, comprehensive high schools, so we started just looking at ourselves and talking about what it would mean to be an instructional leader at the high school. I asked them if they believed they were instructional leaders. I didn't want them to answer out loud, but I could see their answers as we looked around the room. I saw them thinking, "Yes, I'm an instructional leader because I'm supposed to be an instructional leader, but I'm not quite sure what that means and how I can demonstrate that." So, that's where we began.

And, five years later, I can tell you that 100% of LBUSD high school principals are instructional leaders, why they are, and how they arrived there. We work as a team to lead the learning of our students and teachers and departments. It looks different at each site, and each level uses different assessments. But student-assessment data is used by everyone to elevate instruction and to diagnose student learning. We keep asking, where is the learning problem? All the sites are trying to implement a continuous improvement instruction model to help us identify what needs to be done next.

I base principal evaluations on their instructional leadership and how they take responsibility for moving their schools from good to great, which is, in turn, based in their ability to demonstrate continuous improvement at their sites. It is important for me to see how they move their students into more rigorous and challenging curriculum. I want to see how they are growing their college-bound population and how they are decreasing dropout rates. I

[4] All LBUSD schools have a school-site council that participates in site-based decision making. School-site councils, which include both district and community representatives, do not, however, hire or fire principals.

also look to see if they have the right people in the right seats and that they are working to either change the seats or the people.

We also have a very mobile population of students across schools, and our school community was feeling as though our reform efforts were always changing. So, now we are trying a consistent, steady approach, and we meet regularly to ensure that we are on the same page.

Right now, we are struggling with how to use instruction that is individually differentiated for each student. How do we know if it's working? How do we base our assessments in a department and in a curriculum to identify weak areas? How do we work with department chairs, curriculum leaders, and coaches to build an approach to particular learning needs? We are trying to build professional learning communities within each school. Some are stronger than others. Some of our underperforming schools are making more progress because they have young staff who are eager to learn and have greater access to federal resources to fund external professional development. They try to share what they're learning with the other sites, but it is slow and challenging work.

Principal Rotation and Assignment

Following her individual conversations with DeVries, Mathews, and Webster, Evans talked with them about rotating principals. Mathews began:

This year, when I start to think about principal assignments, I will look at the strengths and talents of principals and try to create a match with the staff and community in each school. The executive staff collaborates on assignments. In elementary and middle schools, we really share candidates depending on the needs of the school and where we think the candidate will be most successful. We work together as a team.

Webster added, "Matching coprincipals is delicate work, and we don't like to make too many changes at the high schools. Any change has the potential to affect the whole system." When reassignments occurred, the district sought to move them to other positions in the district where their strengths would be leveraged. DeVries commented:

My principals know that I know the job and that I will try to make the best decision for all of them. We try to identify the schools' needs, the leaders' strengths and developmental needs, and then find a match that suits everyone. Sometimes principals don't see why they've been assigned to a school, but they always rise to the challenge. It is our responsibility to know what our leaders can do—where they're succeeding, where they are struggling, and what they value—so we can help them continue to improve.

Key-Results Groups

As Evans talked with DeVries, Mathews, and Webster, she also noted that they each had mandatory monthly day-long "key-results" meetings with principals. The practice began with the middle school reform effort, where the middle school principals met to discuss their progress and challenges. The discussions were difficult at first, as external consultants "asked tough questions that we weren't used to answering," recalled one principal. As the meetings continued, they developed a focus on reviewing data and challenging issues facing the group.

When DeVries assumed responsibility for all elementary schools, she implemented a similar key-results practice for elementary schools. The principals met in small groups. For the first few years, DeVries had rotated membership in the key-results groups each year in an effort to "give people a chance to meet other principals." But, after receiving feedback that the rotation was too disruptive, DeVries established standing groups and selected principals to lead the monthly discussions aimed at sharing best practices. DeVries observed, "When we find a new idea that works, we want to know how and why it worked. Each site will then have the responsibility and option to see if that idea could work for their school. Demonstrating results is what matters to all of us."

Webster and the high school principals also used a key-results structure for meeting but adapted the model to suit their needs. Since the district sought to have one coprincipal on campus at all times, the high school principals were divided into two groups. For the first three years of their regular meetings, one focused on data and one focused on professional development. It was in these monthly working groups that the principals articulated their high school reform strategies work and shared the challenges in its implementation. The high school principals often invited district support staff to join these meetings so they could share information and challenges.

Professional Development

Before she left LBUSD, Evans summarized what she had learned about the district's approach to pedagogy and professional development. She learned that all incoming teachers received some training about the core EEEI philosophy, which was designed and mandated by the district. Principals also had some discretion regarding additional professional development offered at their site, according to their goals and priorities. The EEEI pedagogy was applied in conjunction with state-mandated curriculum and other materials. District leadership also described their practice of "training the trainer," as there was a commitment to developing internal capacity for professional development, as well as an ongoing need to modify training to suit the district's specific needs.

"The district's commitment to professional development is long-standing," commented one principal. "If people leave us for another district, they are often surprised to see that our approach is not universal." "Of course," noted DeVries, "our focus on professional development is expensive and can be intense. But, we believe it is a cornerstone of our success." Mathews observed:

> We require all teachers—elementary, middle, and high—to learn and apply the essential elements of instruction. Some middle school teachers work with many different classes, so pacing schedules and changing classes can make it difficult to go back, reteach, and make sure the kids really learn their lessons. We are making sure that teachers and administrators go through refresher courses. The middle school principals just participated in a session on active participation. At the middle level, we see differentiation of instruction, active participation, monitoring of instruction, and guided practice as areas in which to focus.
>
> Our principals' meetings all focus on professional development. We meet at someone's school each month, and principals are responsible for identifying a critical question and something they want the other principals to look for while they're visiting. Last month, we talked about critical thinking skills and active participation, and then we walk through the school we're visiting and talk about what we see. Each principal was also required to conduct walkthroughs in their own school and have a discussion with their cohort group at the meeting.

Evans noted that there was a consistency in how things were done, which district employees called "the Long Beach way." She attended a few meetings during the course of her visit, and she noted that the language of the EEEI pedagogy seemed familiar to the majority of the staff. For example, when DeVries hosted a meeting for all the elementary school principals, Evans observed that even the meeting itself was interactive and focused and allowed principals time to talk among themselves as a group and to move around the room.

Challenges

As Evans flew home, she began compiling her findings from the visit. While much of what she had learned in the district intrigued her, it was a lot of information to process. "Now I need to go back and apply some of this in my district," she mused. "What have I learned? Where should I begin to make changes? Which of these ideas will transfer to my district?"

Exhibit 1 District Enrollment (1996–2006)

Year	Total	% White	% African-American	% Hispanic	% Asian, Pacific Islander, Filipino, Native American	% English Language Learners
1996	80,520	21	21	37	21	34.0
1997	83,038	20	21	39	20	35.1
1998	85,908	20	20	41	20	35.4
1999	89,214	19	20	42	19	35.0
2000	91,465	18	20	44	18	36.0
2001	93,694	18	20	45	17	36.4
2002	96,488	17	20	47	16	32.9
2003	97,212	17	19	48	16	32.3
2004	97,560	17	19	49	15	32.6
2005	96,319	17	18	49	15	29.5
2006	92,000					26.3

Source: District records.

Exhibit 2 Statewide Demographic and API Comparison Chart (2004–2005)

District Data	Los Angeles Unified	San Diego Unified	Long Beach Unified	Fresno Unified	Santa Ana Unified	San Francisco Unified	Garden Grove Unified	Sacramento Unified	Oakland Unified
Enrollment	741,367	134,709	96,319	80,760	61,693	57,144	50,030	51,420	49,214
Number of Schools	721	190	86	85	51	108	63	89	123
Student Demographics (Race)									
African-American	12	14	18	11	1	14	1	21	41
Native American or Alaskan Native	0	1	0	1	0	1	0	1	0
Asian	4	9	9	16	3	42	29	23	17
Filipino	2	7	4	0	0	6	1	1	1
Hispanic or Latino	73	43	49	54	93	22	52	30	33
Pacific Islander	0	1	2	0	0	1	1	1	1
White (not of Hispanic origin)	9	26	17	16	2	10	16	22	6
Student Demographics (Other)									
Participants in Free or Reduced-Price Lunch	78	54	61	82	78	54	61	63	71
English Learners	42	28	24	30	59	28	46	31	28
Participants in Gifted and Talented Program	9	21	7	11	7	16	5	6	9
Mobility, School Prior Year[a]		26	22	27	17	13	16	25	21
Average Parent Education Level[b]	2.24	2.85	2.57	2.32	1.53	2.61	2.52	2.67	2.4
API									
2002 API Base	595	677	648	579	570	683	680	644	568
2003 API Base	622	697	682	610	614	706	719	666	592
2004 API Base	633	710	694	623	628	724	722	679	601
2005 API Base	649	728	713	644	656	745	740	700	634
Growth in Prior Year (2004–2005)	16	18	19	21	28	21	18	21	33
Three-Year Growth (2002–2005)	54	51	65	65	86	62	60	56	66
Percent Decile 1–3 Schools (2005)[c]	51.0	28.4	21.1	69.4	66.7	35.2	20.9	41.0	67.7
Percent Decile 9–10 Schools (2005)	9.4	24.2	11.8	5.9	5.9	18.5	9.5	9.6	12.5

Source: California Department of Education, LBUSD Research Department, and casewriter analysis.

[a] Mobility represents the percentage of students who first attended the school in the current year. Students in the lowest grades are excluded.

[b] Average parent education level indicates average of all responses where "1" represents "Not a high school graduate" and "5" represents "graduate school."

[c] The California Department of Education ranks all the schools in the state from lowest to highest achieving. They then categorize the schools into 10 groups of equal size, called deciles. Each decile includes 10% of the schools in the state. The best 10% of schools receive a rank of 10, and the worst 10% receive a rank of 1. Percentage calculations in this table exclude small, charter, and alternative schools.

Exhibit 3 LBUSD Elementary School Enrollments and API Base Scores

Site	Enrollment	API Base Scores					
		2000	2001	2002	2003	2004	2005
Addams	1,131	538	632	669	684	690	710
Alvarado	425	711	700	756	765	794	800
Barton	952	537	561	583	656	680	685
Birney	743	630	691	695	711	737	743
Bixby	464	567	657	671	681	723	732
Bryant	376	631	650	696	718	739	742
Buffum	335	661	676	701	680	738	742
Burbank	945	536	573	587	658	722	724
Burcham (K-6)	483	597	609	601	643	660	681
Burnett	966	466	553	579	638	684	694
Burroughs	308	740	707	700	736	746	776
Carver	468	697	645	702	739	738	765
Cesar Chavez	505						
Cleveland	595	652	639	707	696	719	746
Edison	995	468	570	637	646	685	677
Emerson	n/a	536	614	663	690	739	772
Fremont	395	765	799	842	850	862	877
Gant	702	851	843	855	880	889	911
Garfield	973	471	519	591	624	677	693
Gompers (K-6)	637	541	614	655	686	734	749
Grant	1,323	507	568	583	644	697	718
Harte	1,160	552	590	606	640	711	742
Henry	479	574	620	626	669	713	711
Holmes	618	591	640	643	689	712	710
International	731	497	551	612	668	721	725
Keller	532	480	483	619	689	718	732
Kettering	360	675	705	732	762	801	804
King	1,038	520	547	526	619	683	734
Lafayette	948	529	604	633	672	718	705
Lee	979	496	576	590	616	659	674
Lincoln	1,342	509	539	558	591	663	681
Longfellow	846	752	777	798	792	835	842
Los Cerritos	479	729	760	762	768	788	818
Lowell	648	835	832	811	871	899	914
Macarthur	501	545	573	600	684	710	730
Madison	613	716	736	758	787	798	794
Mann	391	567	627	663	698	739	760
McKinley	898	474	480	593	609	650	657
Muir	957	544	566	616	625	677	695
Naples	270	762	791	815	855	876	892
Prisk	594	752	769	725	768	785	808
Riley	670	529	600	632	683	695	700
Roosevelt	1,071	545	592	586	640	717	736
Signal Hill	779	625	667	697	720	767	780
Stevenson	875	543	597	599	659	705	713
Tucker	386	446	491	601	658	705	731
Twain	809	783	814	835	816	826	832
Webster	703	475	515	558	579	638	664
Whittier	925	427	561	614	651	686	691
Willard	995	561	602	605	633	689	699

Source: District files.

Exhibit 4 LBUSD Middle and K-8 School Enrollments and API Base Scores

Site	Enrollment	API Base Scores					
		2000	2001	2002	2003	2004	2005
Bancroft	1,412	742	723	773	749	774	766
Butler (Mary) (K-8)	201+769	500	492	587	594	632	642
Constellation Community Charter	n/a	490		522	517	573	578
Cubberley (K-8)	1,049	728	756	755	764	774	794
DeMille	1,225	512	525	591	599	641	656
Franklin	1,224	412	469	490	511	557	585
Hamilton	1,445	466	488	536	564	585	611
Hill Classical	1,093	514	519	577	631	699	746
Hoover	1,167	580	618	668	670	713	738
Hudson (K-8)	1,099	622	637	677	706	732	752
Hughes	1,499	734	737	760	752	777	792
Jefferson Leadership Academies	1,123		497	565	583	603	604
Lindbergh	1,087	453	461	541	550	621	681
Marshall	1,242	548	582	612	643	666	693
Monroe (K-8)	913	535	579	629	673	693	716
Newcomb (K-8)	989	793	798	793	800	811	821
Powell (Colin L.) Academy (K-8)	1,454		482	538	604	656	683
Robinson (Jackie) (K-8)	980	562	641	694	714	745	760
Rogers	860	719	741	769	773	802	798
Stanford	1,405	694	731	757	764	789	801
Stephens	1,396	554	552	580	598	614	629
Sutter (K-8)	1,590	601	596	626	655	694	702
Tincher (K-8)	1,137	609	632	682	716	749	765
Washington	984	433	483	457	518	566	600

Source: District files.

Exhibit 5 LBUSD High and Alternative School Enrollments and API Base Scores

Site	Enrollment	API Base Scores					
		2000	2001	2002	2003	2004	2005
Comprehensive High Schools							
Cabrillo (Juan Rodriguez) High	3,609	429	434	424	465	502	539
Jordan High	3,868	472	484	496	505	528	562
Lakewood High	4,140	592	601	609	622	664	708
Millikan Senior High	3,824	586	595	606	607	662	693
Polytechnic High	4,565	635	661	658	655	686	696
Wilson High	4,271	582	623	629	629	674	710
Alternative Sites							
Avalon[a]	713	596	626	654	660	687	692
CAMS[b]	618	909	912	904	883	929	941
Education Partnership High School	997						
Pacific Learning Center Charter	n/a			324	335	332	377
Renaissance Arts Academy[c]	461						475
Savannah Academy (Grade 9)	n/a	468	524	531	550	639	599

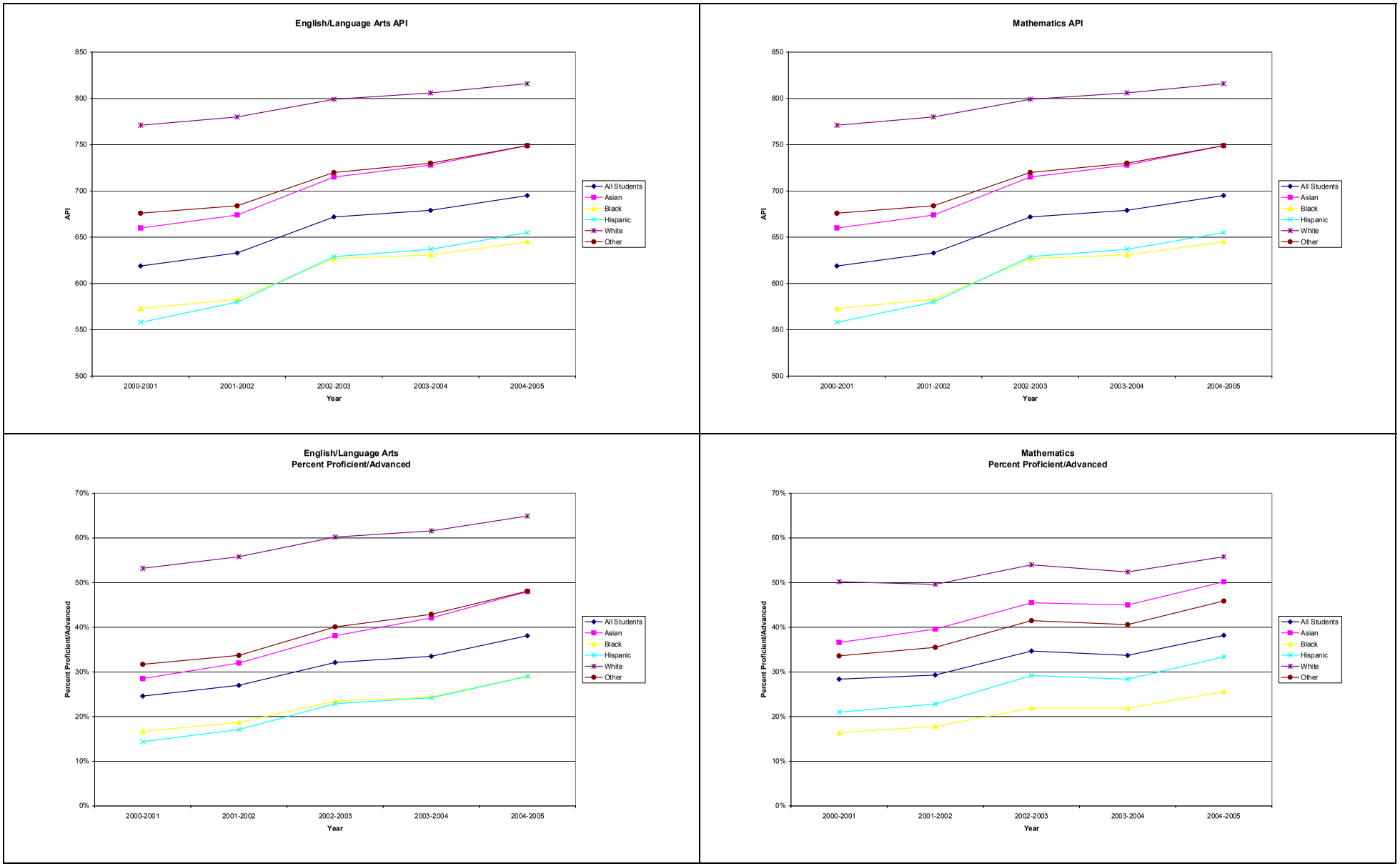
Source: District files.

[a] Small community school on Catalina Island serving students grades K-12.

[b] California Academy for Math and Science magnet school for underrepresented populations located on the California State University campus at Dominguez Hills serving students grades 9–12.

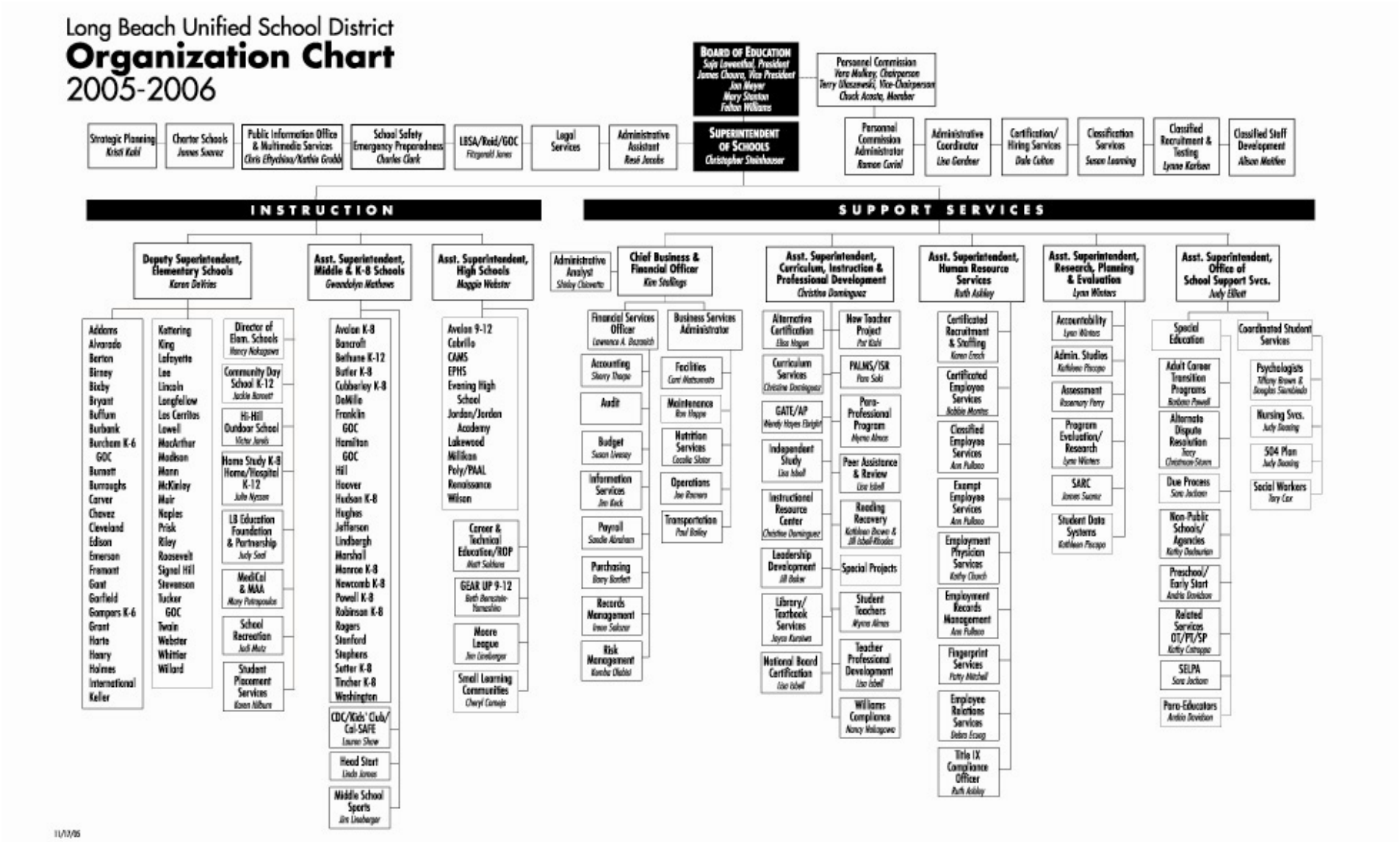
[c] Small inner downtown high school with an arts focus, serving students grades 9–12.

Exhibit 6 Achievement Gap Data (using California standardized test scores and subject area API in English-language arts and math)



Source: District files.

Exhibit 7 District Organizational Chart



Source: District files.

Exhibit 8 LBUSD High School Reform Strategies (2004)

"Every Student, Every Day" is based on the following proven strategies:

- Leadership development for high school principals
- School Level Professional Learning Communities
- Redesigning professional development
- Using data to drive instructional decision making
- Increasing parent engagement

The next phase of the high school reform will add the following key strategies:

- Extend and evolve the work of the Principal and Teacher professional learning communities
- Build distributed leadership by involving all teachers in instructional leadership
- Differentiate instruction
- Redesign the role of high school counselors to focus on student achievement
- Improve culture, climate and learning time
- Strengthen Seamless Education Partnership with local postsecondary education institutions, business and community leaders, to increase college access and success
- Bring business partners to the table to engage support and confirm alignment of expectations
- Provide tutors from postsecondary institutions to work with high school students.

Source: http://www.lbusd.k12.ca.us/district/departments/high_school/initiative.asp.

Exhibit 9 LBUSD Financial Information, 2002–2005 ($ million)

This statement includes revenues and expenditures from all LBUSD funds, including general, adult, preschool, insurance, cafeteria, and construction funds.

	SY04	SY05	SY06
Revenues by Source			
Local	$141.058	$146.841	$126.249
State	606.991	641.517	620.797
Federal Grants	104.562	123.655	137.148
Total Revenues	$852.611	$912.013	$884.194
Expenditures by Object			
Certificated Salaries	356.034	355.815	357.934
Classified Salaries	128.684	123.886	127.702
Benefits	123.559	144.533	159.790
Books and Supplies	51.832	39.062	39.527
Services and Other Operating Expenditures	130.152	136.875	185.358
Capital Outlay	58.844	51.135	34.124
Other Outgo[a]	15.819	21.102	21.530
Total Expenditures	$864.924	$872.408	$925.965
Operating Surplus/(Deficit)	($12.313)	$39.605	($41.771)

Source: Compiled by district financial office from LBUSD financial records (FINSYS).

[a] Object 7611-7619 was netted with local income 8911-8919.

Exhibit 10 Essential Elements of Effective Instruction

TEACH TO AN OBJECTIVE

Formulating an Objective
- what the learner is to learn
- what activity (behavior) the learner is to do
- a statement of the condition
- a statement of the performance level

Concept of Congruency

Teacher Actions
- provide information
- ask questions
- design activities
- respond to learners

Taxonomy
- knowledge
- analysis
- application
- analysis
- synthesis
- evaluation

SELECTING OBJECTIVES AT THE CORRECT LEVEL OF DIFFICULTY

Task Analysis Process
- state the objective
- clarify the learning
- list the essential learnings
  - brainstorm
  - impeach
- sequence the learnings
- restate as diagnostic questions

The Diagnostic and Prescriptive Process
- determine the topic
- formulate/state the objective
- write the task analysis
- design the diagnostic survey
- administer the test
- interpret the survey
- cluster the learners
- write the prescription/plan the lesson
- teach the lesson
- evaluate – begin again

Monitor & Adjust
- elicit overt behavior
- check overt behavior
- interpret overt behavior
- act on interpretation

APPROPRIATE USE OF PRINCIPLES OF LEARNING

FOCUS
- Anticipatory Set
- related to similar past experience
- learner is actively involved
- congruent or relevant to the learning

Motivation
- success
- level of concern
- interest
  - novel/vivid
- knowledge of results
  - specific immediate
- feeling tone
  - pleasant
  - unpleasant
  - neutral

RATE & DEGREE
Closure

Active Participation
- overt
- covert
- should be consistent not eventual

Reinforcement
- positive
- negative
- extinction
  - peaking

RETENTION
Meaning
- related to a similar past experience
- translate into another form
- of what use will this be to me?

Modeling
- correct demonstration presented to learners
- criteria that make demonstration correct are known by the learners

Practice
- massed for a new learning
- best when sessions are short and often
- intermittent for a prior learning

Mnemonic Devices

TRANSFER
Anticipatory Set
- related to a similar past experience
- learner is actively involved
- congruent or relevant to the learning

Source: District files.