

Boston-Harvard Leadership Development Initiative (LDI)

Year Five Evaluation

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EXECUTIVE SUMMARY

The Boston-Harvard Leadership Development Initiative (LDI) is a five year program designed to build the leadership capacity of educators in the Boston Public Schools in order to enhance overall academic achievement for students. Begun in 1997, the LDI is a partnership of the Harvard Graduate School of Education (HGSE) and the Boston Public Schools, with funding and support from FleetBoston Financial Foundation and Harvard University. The LDI entered its fifth year of FleetBoston Foundation funding during the 2001-02 academic year.

ROCKMAN *ET AL*, an independent research firm, conducted a final, Year 5 evaluation to help the project staff and partnering organizations identify program elements that are most important to preserve or modify in future rounds of the program. Information was gathered through interviews with key school participants and surveys with graduate students of the Harvard Graduate School of Education who served as LDI school consultants.

School participants and HGSE doctoral students serving as LDI consultants identified a core set of LDI program characteristics that enabled schools to take on the important and complex challenge of building the leadership capacity of educators in the Boston Public Schools. Through its summer institutes, workshops and seminars, and LDI consultants and faculty, the LDI program provided school professionals with a diverse range of program components and services aligned to the Six Essentials of the BPS Whole School Improvement Plan deemed highly valuable and worthwhile. The specific elements and benefits that participants identified were:

- Research-based “grounding” and real-life exemplars of whole school change and instructional leadership: The LDI summer institutes, seminars and workshops provided school participants with valuable information about educational reform initiatives being emphasized in the Boston Public Schools that are “grounded” in research, or informed by educational theory. Armed with research-based evidence, coupled with visits to exemplary schools demonstrating the effectiveness of certain methods in raising student achievement for all students, educators described how the LDI gave them a useful, alternative perspective that strengthened their understanding of, and conviction behind, the importance of current educational reform efforts.

- Knowledgeable, Personalized “Outsider’s Perspective”: Through the LDI project director, graduate student and faculty consultants, school participants received information, support and advice from knowledgeable individuals outside the Boston Public School, yet ones highly familiar with their specific school and district contexts in

which they worked. Participants viewed the support offered as relevant, credible, trustworthy and well informed. A major focus of the efforts centered around the analysis of student data and test scores, to enable schools to become increasingly “data-driven” in their instructional decisions.

- Practical Skills and Techniques: The LDI workshops and seminars offered practical real-world skills that participants could apply day-to-day in their work in schools. Seen as particularly valuable were the critical people-oriented skills necessary for being a successful educator working with others. Learning how to conduct difficult conversations with colleagues, to run effective meetings, and to build teams were seen as essential when trying to move forward an agenda of instructional leadership in their schools.

- Opportunity to Think, Reflect and Act Upon Issues of School Improvement: The LDI afforded school professionals the opportunity to have the time, space, and opportunity to reflect on their professional lives, and share their insights, concerns, challenges, hopes, and plans for their schools. Individuals spoke about the importance of treating the school participants as true professionals: offering them choices, rather than directives, to select professional development opportunities that best match their needs and interests, and to allow them to identify the particular issues and objectives they wished to focus on each year in their LDI teams.

- Social Structures for Supporting Instructional Leadership: The LDI School Community: The LDI enabled educators to get together and be part of a close, yet broader community to share problems and solutions, setbacks and successes. The collegiality built over the multi-year program was clearly evident in LDI sessions, where educators animatedly discussed with each other what was occurring at their schools. It offered a rare opportunity for open, honest exchange with other educators within the Boston system, in an atmosphere of trust.

School participants suggested a number of program recommendations for future rounds of the LDI. Recommendations included the use of a shorter, 3-year period for school involvement, greater specification of goals, outcomes, and secured commitment from both school administration and teams for LDI participation and use of the LDI consultant; a yearly process of reflection and assessment of LDI team progress; continued utilization of both the regular “weekly” model and paired expertise model of LDI consultant support, and increased support from the district administration, such as greater commitment and resources from the district.

Individuals expressed some of what they experienced as the challenges confronting the LDI program participants, including the challenges of establishing shared leadership teams, the difficulty in sustaining whole school change initiatives when faced with the multitude of teaching and administrative duties and priorities back in their schools, the significant turn-over of administrative heads and staff in their schools, and the need for greater involvement, understanding, and support from district administration.

Based on the findings from the final Year 5 evaluation, coupled with our Year 4 evaluation, the evaluation team strongly recommends that the LDI's comprehensive, multi-year model of professional development and support around instructional leadership continue. The LDI provides an integral system of support that serves to sustain schools' progress in building school-site leadership in the Boston Public Schools and enhances academic achievement of all students.

INTRODUCTION

The Boston-Harvard Leadership Development Initiative (LDI) is a five year program designed to build the leadership capacity of educators in the Boston Public Schools in order to enhance overall academic achievement for students. Begun in 1997, the LDI is a partnership of the Harvard Graduate School of Education and the Boston Public Schools, with funding and support from FleetBoston Financial Foundation and Harvard University.

ROCKMAN *ET AL*, an independent educational research firm, was hired by the LDI in June 2000, to conduct an independent evaluation of its program. Major evaluation activities took place during the final two years of the program and were designed to provide the participants and funding agency with information about the reach and impact of the program. Before presenting the results of the Year 5 evaluation and our observations for further efforts, we will review the Year 4 findings.

CONCLUSIONS FROM THE YEAR FOUR EVALUATION

During the 2000-01 academic year, we conducted an evaluation of Year 4 of the LDI. The goal was providing an initial assessment of the reach and impact of the LDI program on the twelve LDI schools and its participating school team members, and the extent to which LDI activities reinforce and enhance the whole school reform initiatives in the Boston Public Schools (BPS). The Year 4 evaluation also assessed the degree to which the program contributed to the professional development of the Harvard doctoral students serving as LDI consultants to the schools, as well as enhanced the faculty and programs of the Harvard Graduate School of Education.

The data showed the LDI program to be of great value to teachers, administrators, GSSE consultants, and Harvard faculty, putting educational theory into practice within the context of school reform. Though the motivation and objectives of each of these groups differed, all expressed the benefits of being part of a long-term project that provided a strong foundation for collaboration and exchange of ideas.

School administrators reported growth in their effectiveness as administrators, noting improvements in their team leadership, communication, conflict resolution skills, and their ability to work well with teachers and staff. Teachers gained a deeper understanding of instructional strategies, best practices, and increased use of theory to inform their teaching practices. They also expressed a heightened level of empowerment, and their ability and role in implementing change in their schools. A comprehensive set of benefits

at the school site level were also reported by administrators and teachers alike, including greater engagement in the whole school change and the six essentials of the BPS school reform, a more positive and collegial climate focusing on instruction, and increased levels of action and effectiveness in site initiatives related to school change efforts.

As for the value of the LDI program to the Harvard partner, the Harvard Graduate School of Education (HGSE), the doctoral students were unequivocally positive, stressing the ways the LDI allowed them to put theory into practice, and provided a challenging real-world context to gain valuable experience and insight into integration and applied school change. Students also reported that the LDI enhanced their career development by providing school-based experience that later evolved into further research and/or an impetus for working in urban schools as administrators or faculty.

Harvard professors engaged as LDI consultants and faculty also reported positive benefits from their participation. They stated that the LDI connected faculty and their research to practice, and served as an important reminder of the complexity and problems faced by teachers and administrators, which, in turn, enabled them to produce better-informed and more relevant research. Faculty also regarded the LDI as a valuable, enhanced program offering at HGSE, describing how they had observed first-hand the important professional growth experienced by their doctoral students who had served as LDI consultants.

All three key groups we spoke with in our study—the school administrators and teachers, the LDI graduate school consultants, and the Harvard faculty—were emphatic about the positive impact the LDI program had on their own professional development, their jobs, and the schools. Working hard on the complex and difficult process of school change in urban public schools, they all could point to personal and professional accomplishments that they attribute to LDI. At the same time, they recognized that the work is not yet done, and that much remains to be accomplished. They witnessed first-hand the difficult process of school change: where improvements can be modest, and large gains difficult to sustain; where staff turnover only exacerbates the problems of providing successful teaching. All underscored the importance of the LDI program continuing its exemplary, productive efforts, and securing further funding and support for the program in the coming years, a recommendation that the evaluation team regards as well-founded.

DESCRIPTION OF THE YEAR FIVE EVALUATION

The Boston-Harvard Leadership Development Initiative (LDI) entered its fifth and final year of FleetBoston Foundation funding during the 2001-02 academic year. As the LDI program staff turn their energies towards future rounds of the LDI and securing additional sources of support, the primary objective of the LDI Year 5 evaluation was to help the project staff and partnering organizations identify program elements that are most important to preserve or modify in future rounds of the program.

We conducted two studies this past year to address these concerns. The first included interviewing key school participants involved in the project for several years. We asked individuals to identify the elements of the program that have been most important to them and their schools, and to offer recommendations for various program elements such as school selection, role of the LDI consultant, and program duration.

Participants held a range of school-site positions (i.e., heads of schools, other administrators, teachers), length of LDI involvement (ranging from 2-5 years), and were drawn from eight of the twelve LDI schools. We contacted 15 individuals, and 13 (87 %) agreed to be interviewed. We conducted 30-40 minute, individual interviews by phone that were later transcribed for analysis.

The second study involved the doctoral students of the Harvard Graduate School of Education who have served as LDI consultants to schools over the past five years. These LDI consultants received electronic surveys, and were asked to identify the program elements they felt were most critical and essential to their school teams, as well as to themselves as graduate student consultants. We also asked students to offer their input regarding ways to improve the LDI consultant component of the LDI program.

All 28 graduate students who served in this capacity as LDI consultant for a minimum of six months received an electronic survey via e-mail. Sixteen individuals (57%) completed the surveys. Eleven of the graduate students had worked as a regular consultant with one school, primarily, (representing ten of the LDI schools), two had worked as curriculum consultants offering assistance with data analysis to all LDI schools, and three had worked both as curriculum consultants and as “regular, single school” consultants.

The major themes and points raised in these interviews and surveys form the basis of this report and are presented below.

SCHOOL PARTICIPANT AND CONSULTANT PERSPECTIVES ON THE VALUE OF LDI

1. Research “grounding” and real-life exemplars of whole school change and instructional leadership.

School participants frequently made the point that the LDI provided them with valuable information about educational reform initiatives—initiatives emphasized in the Boston Public Schools. LDI helped them clarify how the district’s efforts were “grounded” in research, or informed by educational theory. Armed with research evidence about effective strategies for raising student achievement, educators described how they gained a useful, alternative perspective, one that strengthened their understanding of, and conviction behind, current educational reform efforts.

I think it is so important [for K-12 educators] to be grounded in the research experiences, knowledge and support that has set the stage for places like Boston to be taught and engage in best practices. They need to be continually exposed to this, the theory behind it, the research that supports it, so that they just don’t see it as one more thing being dumped on them, but realize that it comes out of a context of people continuing to try to understand how learning happens and have studied practices that have worked. (Elementary School Principal)

The material that [the LDI] presented was timely, relevant, and offered informed practices as teachers and as administrators that nothing else within the system did. The system tends to be more pragmatic and involved in [details] or transitional elements; something that is occurring right now and we have to get you up to speed. Where LDI might be over-arching – these are the strands or currents that are going through education. (High School Administrator)

LDI has a pulse on the different initiatives that the system was adopting, and offered another avenue for looking at those initiatives and having an exchange with experts. That doesn’t happen with the system...With the LDI, you hear experts so it broadens your spectrum in terms of getting information and making decisions. (High School Head)

Participants frequently cited the work by Harvard faculty member, Richard Elmore as powerfully altering their understanding of the importance of instructional leadership and best practices in education. His presentations and continued presence at various annual LDI Summer Institutes, as well as visits to specific school sites, had a strong and lasting impact on many participants. One high school administrator spoke about hearing Elmore at one of the summer institutions and having a burst of insight about the district initiatives

being demanded of the schools. As she expressed, “We all had our “ah ha” moment when we understood for the first time why the superintendent was pressing us—all of the schools—to go in a particular direction... there was never a discussion, never the thinking or theory behind this direction... we didn’t have the same intellectual and emotional buy-in. But once we heard the theory as explicated by Dick Elmore, we went “ahhhh.” We could take the theory and take the ideas, concepts, and then had an opportunity to work them into the fabric of our school.”

A high school teacher in this same school spoke about how she felt Elmore’s work made her a more thoughtful, reflective teacher: “[He] broke down where education was going and what I should be doing as an educator to keep kids interested in public schools and also what they need. So now I’ve started looking at “What am I doing and why am I doing it? What need is this going to fulfill for the student, besides just the content need? How is this going to help the kid in the future?” And not just, “I teach this because this is the class.” Really reflecting and thinking about what I’m doing in life.”

Similarly, theoretical frameworks such as the “Four Frames” presented by faculty member and LDI advisory board co-chair Susan Moore Johnson, were cited by school staff as helping them more fully understand and interpret actions made the various “players” in education (teachers, school administrators, district administrators, parents) and providing a useful tool when strategizing effective actions and decisions in their own schools. As one high school head conveyed, “There are always four arenas—political, symbolic, procedural, human relations. When you talk about implementing change, one of the things we learned was when we do something, look at those four areas and try to strategize where you think the resistance might be and what you can do to offset it.” Her colleague added how she had learned about the importance of the “political frame”: “One of the things we learned is that our natural tendency is to go the procedural because those are the easiest things to manipulate. But harder than that, and what is more difficult but where you really get the bang for the buck is the political.”

To balance the research and theoretically oriented presentations, LDI also offered opportunities for school participants to learn first hand about school reform efforts in practice. Many LDI participants described how inspiring it was to visit New York City schools including those in District 2, and to hear speakers such as Dr. Lorraine Munroe and others who led these schools. Teachers, as well as principals, found it extremely rewarding to see how schools are reorganized: the physical arrangements of classrooms, day-to-day routines, positive impacts on student achievement, teacher-student interactions, and overall school climate.

LDI members from a number of the schools in Boston flew down to visit the Manhattan New School and spent the better part of the morning there and went out to lunch with its founding principal. One elementary school principal reported that she and five of her staff took part in this visit and found it provided a very significant boost to her staff: “It allowed them to see what we’ve been reading and talking about. It gave them a sense of, ‘Oh, this is what it is all about. Maybe we can do it.’ And as we started the [LDI sessions] that fall, they could forever visualize what we had seen down there, and reference it.”

One high school administrator spoke about how he appreciated that the LDI is “reality-based. It isn’t “pie in the sky;” it isn’t theory. They’re talking about actual practice.”

In short, the presentations, readings, and consultations provided by Harvard faculty members, other scholars, and leading educators, coupled with visits to exemplary schools, provided LDI participants with alternative perspectives, conceptual frameworks, and real-life models to inform their work. It allowed them to see the “big picture” of whole school change—informed by research, theory, and practice—across the country. As a result, educators felt less parochial and reactive to BPS initiatives and mandates. They were much less inclined to view these initiatives as a passing trend or something simply handed down from the district office. Rather than being “obedient educators,” as expressed by one LDI administrator, they were now empowered advocates for these initiatives.

2. Knowledgeable, Personalized “Outsider’s Perspective”

Through the LDI project director, its graduate student consultants, and faculty, school participants received information, support and advice from knowledgeable individuals outside the Boston Public Schools. School participants found the outsiders’ perspectives extremely valuable because the outsiders learned about each school and the district by making regular visits to the schools, gaining first hand experience at each particular school and getting to know the staff. Faculty experts were available as additional resources whose services could be requested by the schools. Support was tailored to individual schools, yet it was closely aligned to the mandates and initiatives of BPS. As a result, participants viewed the help they received as appropriate, credible, trustworthy and well informed.

A big piece of it was [the LDI project director]. She was there to organize, and because she is an educator herself and she’s been in the schools, you didn’t feel like you were just talking to a consultant that hasn’t been in the classroom... There were always workshops with people who were either doing research in schools, or real active participation [in schools].... There was a proven track record, credibility. (Middle School Administrator)

The value of the LDI consultant was principally expressed by the heads of school, who viewed the consultants as informed confidantes who offered an outside perspective and objectivity, as well as encouragement and “nudges.” Such sentiments were expressed both by “veteran” heads of schools who had been at their schools for over 15 years, as well as those who were brand new heads of their schools. Several talked about how their LDI consultant engaged them and their staffs in “brainstorming conversations” in order to hear viewpoints and ideas from everyone in attendance, and to model how to lead discussions where the principal could assume a role of equal participant rather than dominant leader.

At last week’s ILT (Instructional Leadership Team) meeting, we were talking about data and informing instruction. After the meeting [my LDI consultant] said to me, “This is what I heard, and this is where the discussion led. Was that your intention?” I wouldn’t have been able to do that because I was in the midst of the discussion. I’m here all the time, whereas he comes in and out, and can see it from a different perspective. He has a fresh pair of eyes. (Elementary School Principal)

[My consultant] had the ability of being able to talk with me and debrief with me; sort of nudging me along, in conversation that caused my own reflecting. I trusted her experience and background, as someone who is not immediately caught up in our school, but is willing to take a supportive stand, coming regularly from the outside, but also from an ivory tower that I respect. That helped to keep me moving at a more respectable pace. (Elementary School Principal)

One teacher also expressed how she recognized the valuable “critical friend” embodied by their LDI consultant, saying, “I think he helped initiate a lot of things that administrators were just unsure how to do. He helped them by bringing in a different perspective about how things should be run, and as an outside observe to say it’s not working... Most of the people at our school are 22 to 30 year vets of the same school. He brought in a fresh voice... It’s very important to have an outside person who can kind of blend in and become one of the faculty, but who is still outside to give helpful suggestions on how to change things.”

Consultants also described some of the value of their consultancies in terms of offering this “outside” perspective. As one consultant noted, “One of the important features of LDI that benefited the schools was having the resource and training experience of doctoral students from Harvard who were freshly stepped in current educational theory and practice, and who, in many cases, were able to assume the role of

‘the outsider looking in.’ This I think is critically beneficial to schools, that are oftentimes so totally mired in the day-to-day functioning and management of school communities.”

3. Customized Support for Each School: Analysis of Student Data

The LDI consultants provided support and guidance on issues of local, state and national importance, yet customized this help to individual schools. The consultants focused their efforts on student data and how they can be used to inform instruction. An important focus of the LDI workshops, seminars and consultants was on schools examining student achievement and student assessment data. Most schools worked to improve test scores, predominantly the MCAS (Massachusetts Comprehensive Assessment System), rather than on regular student classroom instruction. Given the high stakes nature of the MCAS, and the 10th grade test required for graduation, it was a high priority area for schools.

The LDI consultants assisted schools in two major ways. First, two consultants with expertise in MCAS testing and student assessment served as resources for all twelve LDI schools. Second, the regular LDI consultants working in individual schools on a weekly basis usually focused a significant portion of their efforts on testing. Schools very much appreciated the “customized support” they received around the work they needed to do around student achievement, as reflected by standardized testing.

One middle school administrator spoke about how his school’s In-Depth Review had focused on their low test scores, and that student achievement testing became a major focus for the school and their work with the LDI. He described how the LDI consultant helped them stay focused, and provided extra support to their teachers. This administrator noted the importance of customizing the help it received, “The school department offers many workshops, but they are not specific to the needs of a school. All schools are different. We all have to follow the Boston whole school change plan, the framework, but schools are different in terms of where they are in their development... The LDI takes into account the individual school... Like a teacher in a classroom, rather than generalizing about the whole class and making general statements, the LDI focuses on, ‘This is the [name] school, and this is where they are... What is it that you need?’”

Another LDI school participant also contrasted the customized and sustained support from the LDI with other more general presentations and recommendations, saying, “[The LDI consultants] come into the school and offer assistance. They were willing to come in and work with that grade level. It’s not a one-shot deal... they set it up so that the MCAS focus is on YOUR school. It is not a fluff school somewhere else or a hypothesis of what could and would happen. It is about your school, your scores and your students. I think it was a lot more powerful and it held a lot more credibility than just listening to someone

talk about MCAS and scores and this is how you do this with your students. They don't know your students.”

In order to promote “student data-driven” instructional decisions, schools are undertaking a great deal of work to pull student scores and other data off of the Boston Public School information system and process them into a form that is understandable to school faculty and administrators. Schools found that that this type of student analysis not only required expertise sophistication, but was also labor-intensive in ways that exceeded available staff time. There were major hurdles in the ways student data and scores are kept in the Boston Public Schools, and many long hours were put in by the LDI consultants to help retrieve, re-enter, analyze and present data for each school, and for its particular individual students. Sometimes, the LDI consultant worked directly, and for extensive amounts of time, with the school's MCAS data.

The person I have now is doing a lot of work on data...He is pulling it all together for the teachers. He has pulled out things that we didn't have either the time or the knowledge to look for in the MCAS data, the Stanford 9 data, and the formative assessment that we take here in the school. Now we are starting to look at that and translate that into classroom practice. Even now we are taking another round of formative assessment, and we are seeing a lot of improvement. So it has been vital, for someone to help us use the data, evaluate it and put it into practice for our particular school population. (Elementary School Principal)

I get the sense that it is really valuable for schools to have had [a few consultants] who have gotten to know them and their needs, so that we can help them look at their data in ways that are useful to them. There is a lot of frustration with what the school district is not doing for them and not helping them with, and I think that having a few of us who can work with them closely and on a more intimate basis than can the district is a unique aspect of the LDI program. (3-Year Consultant)

LDI consultants' contact and “reach” into the school was often deep and comprehensive, meeting not only with the schools' LDI team participants, but large groups of faculty, students, and even parents. Since the data work was school-specific and was conducted with individual classrooms and individual students, consultants provided teachers and students with a customized analysis to inform teacher strategies for classroom instruction, and student strategies for taking tests.

It was very helpful to have [the consultants] come in and really look at our data, and then do workshops not only explaining it to the administrative team but also

doing workshops with the entire faculty, because we thought of it as an entire faculty issue. It wasn't just the tenth grade or the ninth grade. That was very instrumental for us (High School Head)

Looking at student work, at test scores and data...[has] had a direct impact on both teachers and their instruction, and on students and their learning. They not only came to our school and worked with our staff on test-taking strategies, but a couple times they've spoken to the students, gone right into the classroom, and tried to ease the anxiety of what it is to take a major test like the MCAS...(Middle School Administrator)

One middle school administrator reported how the LDI had helped them improve their test scores, since in all the years that they've been involved with the LDI, their test have steadily gone up. He attributes this to the ways in which “[the consultants] broke it down so teachers could actually see how close their students were from going to the next level. It gave teachers an opportunity to push a little more, to look at the specific items, and see where maybe they needed a little different instruction...and encourage students that really aren't shining academically to put in the effort and at least try something.”

Schools greatly valued the efforts of LDI consultants to work closely with their sites and “customize” their support, reflecting the schools' needs, and helping them implement aspects of school change in the day-to-day mix of instructional activities.

4. Practical Skills and Techniques

The LDI workshops were also considered worthwhile because participants were offered practical, real-world skills to apply in their day-to-day work. The workshops most often mentioned by educators in this area included the development of critical people-oriented skills necessary for a successful educator: working with others, specifically on how to conduct difficult conversations with colleagues and how to run effective meetings. Both were seen as invaluable skills to promote an agenda of instructional leadership. For educators who often approach workshops with the question, “what can I bring back to my school and use on Monday morning,” these workshops covering critical, but very practical skills and techniques, were extremely satisfying and rewarding.

One elementary school teacher was particularly appreciative of variety and utility of the LDI workshops. “Team building and conducting difficult conversations and just being able to express without demand—I thought that was really critical, especially when you're talking to people who you're asking them to change things they've done a

particular way for 25-30 years. They had experts in the concepts of whole school change but they also had experts in like every-day instruction. That's a rarity."

Consultants corroborated the high quality of seminars and workshop that were provided through the LDI. One consultant said "[One of the things that] the LDI does incredibly well is that it brings truly intellectually stimulating and practical professional development opportunities to its participants."

5. Opportunity to Think, Reflect and Act Upon Issues of School Improvement

When graduate consultants were asked what they regarded as the most critical elements of the LDI program for their school colleagues, they did not describe specific events or workshops, but did cite the chance for school professionals to have the time, space, and opportunity to reflect on their professional lives, sharing their insights, concerns, challenges, hopes, and plans for their schools. One consultant described the LDI project as "sacred time for within-school groups to talk with each other about ways to improve their schools."

School participants mentioned the LDI Summer Institutes as an invaluable time to reflect upon the past year, to take stock of the degree of progress they have made on past goals and objectives, and to identify goals and strategies for the coming year. Several schools also opted to have an LDI-supported faculty retreat that they regarded as extremely helpful. One elementary school principal expressed how important it has been to have "the opportunity to talk about changes in our building and plans for future changes. We have had some very important dynamic discussions that I don't think would have happened if we were just sitting around the instructional leadership table at our school. We were probably helped because I could leave the facilitation of that discussion to the LDI consultant [and could be more of an active listener]."

School staff and consultants alike spoke about the importance of treating the school participants professionally, offering them choices, rather than directives, to select professional development opportunities and courses of action that best matched their needs and interests.

[The LDI has a] totally different atmosphere from most other professional development classes that I have participated in, where I felt compelled to do something, and in most cases have not found rewarding...[Whereas the LDI] has addressed my issues of concern. It has allowed me to speak about it, share and learn from others, and to come away with something positive. (Elementary School Teacher)

[The other special district initiatives] had strings...Those initiatives had in mind already what they thought would make things better, as opposed to helping the schools look from within themselves and with some outside help to find what would make things better. (High School Head)

The LDI offers opportunities to learn about options that school people can consider as they think about improving their own school's climate or classroom practices or way of tackling problems and thinking about issues. (5-Year Consultant)

Several school participants mentioned the importance of opening up some of the LDI events to the faculty, such as seminars, workshops and the Fleet Forums, and having LDI experts come to the school. They felt that this helped expose and engage the broader school community in the issues of whole school change. As one elementary school principal said, "I think the Fleet Forums have helped...Sometimes a few opportunities for the whole faculty helps them feel a part of it, and better appreciate what the small group [the LDI team] is doing and can do."

6. Social Structures to Support Instructional Leadership: The LDI School Community

For many school participants, an important part of LDI was the ways in which it provided an opportunity for a select group of educators to get together and be part of a close community. The collegiality built over the years was clearly evident in LDI sessions, where educators animatedly shared what was occurring at their schools.

One middle school administrator described this professional camaraderie, as "There's the collegiality of the people that you've met there, and the opportunity to speak with other colleagues that are going through some of the same frustrations that you are, and hearing ideas".

One elementary school was allowed to join the LDI in Year 4 of the program, since their new principal was already an active LDI participant when she was at another school. The team members from this school, mainly teachers, were enthusiastic about their participation in the program, as evidenced by their high and consistent attendance at LDI events during the final two years. As one teacher from this team noted, "It gave me the opportunity to meet other colleagues very much in the same teaching environment and situations that I find myself to be in. We've been able to share and learn from each other."

Heads of schools rarely have an opportunity for open, honest exchange with other Boston educators. More typically, interactions with others in the district are with one's supervisors, or part of a formal review process, such as the In-Depth Review (IDR). Several school participants described the important atmosphere of trust established in the LDI program:

I really enjoy being in those groups of ten to twenty people, K-12, a sampling of principals and other people either in administrative roles or teacher. Sharing with each other and learning together, but it's not led by people who later on are going to evaluate my people. We know we're doing it because we come from a common place, but not exactly the same place...other fine people who directly know the Boston Public Schools. (Elementary School Principal)

I feel that there is a fair exchange of ideas and discussions about issues at Harvard...When I am talking in an LDI forum I know that I am putting my ideas out there and getting some honest feedback and not being concerned that it is going to haunt me in a negative way. There is a trust in those forums. (High School Head)

On a district level there is support for teachers and professional development. But for administrators, to get among each other and really talk candidly and trying to get information – that doesn't happen a lot. I know our administrators always say it's nice to go someplace and be appreciated...they don't get that very often. (High School Teacher)

Consultants echoed a similar sentiment about the importance of fostering sustained contact and greater communication between school professionals.

I feel the opportunities to meet and discuss issues related to the district and individual schools should be continued. School personnel tend to be isolated in their own schools. Having the chance to speak with colleagues from other schools helps to build a bigger picture of the work going on in the district. It also helps folks to think about forming other kinds of relationships of alliances based on issues of teaching and learning. (3-Year Consultant)

It is important to maximize the opportunities for participants to interact with others outside of their own schools through workshops, site visits, and conferences. (3-Year Consultant)

My suggestions for what to continue in the future include...time for school teams to work together and with other teams that have similar interests. I would also suggest that we find ways for school people to connect across the elementary-middle-high divide and try to create some coherence for students as they move through the system. (5-Year Consultant)

One consultant recommended that the composition of the set of schools be considered when selecting individual schools for future rounds of the LDI. She felt that the LDI should encompass “schools that are newer to the process, schools more established in the process of leadership development, larger schools, smaller schools, so that different models are shared and participants come to understand that leadership development is a continual process.”

The high level of collegial spirit among the LDI schools would have been difficult to establish if the LDI project staff treated school participants in anything but a warm, supportive, respectful, and professional manner.

I have been working for the Boston school system for 33 years. It wasn't until I started going to the LDI seminars that I started to feel like I was treated as a professional...I give a lot of credit to Peggy who has great organizational skills, great people skills. Being a listener, you really feel like she is responding to your concerns, ideas. I think she has been key to the success of the LDI over the past five years. I can't say enough. And the people she has brought in to work with her exhibit the same qualities. (High School Head)

Having been exposed and involved with the LDI – being at Harvard and meeting the various people that I've met there that are affiliated, it's uplifted my spirits in that I felt respected, I felt worthy. I was treated well. In fact, I think we all were because within our busy schedules, somehow we found the time to appear, to attend every class, and every Saturday three-hour session. (Elementary School Teacher)

One consultant noted, “The respectful attitude toward the school participants that has been a hallmark of the LDI should certainly continue.” For her school, and others as well, she felt that “the LDI represents an entity that is trusted and respected by those who have participated.”

PROGRAM DESIGN RECOMMENDATIONS FOR FUTURE ROUNDS OF THE LDI

After the Program Director identified features that could be part of future rounds of the LDI program, school participants were asked for their feedback. The possible features for consideration were the length of the LDI program, the preferred models of the LDI consultant support, and important areas of consultant expertise. Participants and consultants were also asked for recommendations on the school selection process, and ways to strengthen building- and district-level support.

1. Make the program term three years instead of five

Participants were asked to react to the proposal to reduce future rounds of the program from the current five-year time period to a three-year time frame. Participants unanimously felt that the three-year time frame was a good idea, citing the high turnover of staff and changing district initiatives that occurred over the longer five-year period. They felt that three years was a satisfactory, multi-year time period in which schools were more likely to have a continuous core membership of their LDI team. Within a shorter period they could tackle, and hopefully see progress, on the different goals and tasks that they sought to accomplish through the LDI.

2. Continue to utilize both strategies of LDI consultant support

Over the past few years, there have been two predominant strategies of LDI consultant support. The first assigned an individual graduate student to each school to meet weekly with the principal and other LDI team members. The LDI consultant assumed a range of tasks and responsibilities typically defined by the principal. The second strategy established specialized services in the area of analyzing student achievement data and scores as requested by a school. This approach consisted of a pair of graduate students who worked as a team to assist schools. Participants were asked if they preferred one model to the other.

School participants couldn't easily choose one preferred model, citing that each strategy had been extremely helpful to their school. With MCAS testing a major focus in schools, participants believed the expertise and services offered by the consultant pair to be top-notch. They especially appreciated the school-specific analysis (classroom by classroom, to the individual student level) that allowed teachers to interpret the data and change their classroom practice based on that analysis. The pair was also available by request for repeated visits to meet with academic departments, entire faculty groups, students, and parents.

School participants, with few exceptions, also valued the role played by the regular graduate consultant who was a familiar and regular presence in their school. Consultants were asked to give an 18-month commitment to the LDI program to be accepted. In fact, many of the consultants served their LDI schools for at least two years, with a number serving in this capacity for three, four and even five years. For the few heads who were new to the school (appointed during Years 2 or 3 of the LDI), they found their LDI consultant an invaluable confidante and supporter who knew the school better than they did, and had “history” with the school. The value of these regular consultants were most typically described as important “sounding boards” as principals thought through issues and actions, and helped keep teams “on track” and make progress.

[Our LDI consultant has been with us for a number of years] and she has been a huge piece of LDI. Just her presence around the school, her knowledge of the school. Lots of times consultants come in and they don't know the population that they are consulting for. She is right in there, she's recognized around the staff, the teachers are comfortable with her, the students are comfortable with her. Some of the ideas, her persistence at times, when we would get a little bit lazy, keeping us on task, certainly has been a big influence...Helping to keep the school moving forward, and being able to take that step back when we are all involved in the day-to-day operation of the school, she kind of gives us that extra pair of eyes, seeing what we are addressing, or what needs to be addressed, or what might be neglected, that we didn't even see. It's invaluable. (Middle School Administrator)

[Our LDI consultant] has been able to ask the hard questions and to not let go, and that's important. Because we would bring up an issue and we'd start to talk about it and then something else would come up and something else would come...and a couple of weeks down the pike, the consultant would say, "OK. Two or three weeks ago you were talking about this. These are the steps that you were talking about. What have you done on it?" (High School Head)

The value of these regular consultants was most positively emphasized by the heads of schools and administrators who actively participated in administrative teams, and less so by teacher participants in the LDI. It appears that in at least in some of the schools, the LDI teachers had much less contact with the LDI consultant, and consequently viewed the consultant's role as mainly assisting the head of school. Notable exceptions were cases in which the LDI consultant regularly attended the school's Instructional Leadership Team meetings, and thus, the LDI program intersected an established Boston Public School (BPS) team structure that drew from various teachers across the school.

The graduate consultants were also polled to learn whether they recommended the LDI consultant model be based on the “one regular consultant to a school” approach versus “paired team of experts” approach. Most of the consultants (nine out of fifteen) felt that both models should continued to be offered. They recognized how highly individual schools’ needs were, and the importance of offering a number of choices to schools to best suit their needs:

It’s hard to recommend just one, since both have been useful. I think each school needs a consultant to help them follow through on what they say they want to accomplish (and one consultant might cover two schools). Having access to pair of consultants with special expertise is also important to schools, especially when that expertise is in an area that receives so much focus from the district. I do think that it would be a good idea to help the schools develop the skills they need rather than just come in and be “the experts”. (5-Year Consultant)

I do not ascribe to the notion that “one approach fits all.” I think this would be very misleading given the variety of needs in our public schools. (1-Year Consultant)

One consultant pointed out how offering schools the two different consultant options could in fact offer a useful strategy to help schools articulate their school’s needs, saying, “Both approaches have advantages and disadvantages that schools need to consider in deciding what is best for their particular context and situation. What I would suggest is that when schools say they prefer one arrangement over the other that they present the case for their decision. This should help them and the LDI be clear about what resources are needed for what purpose(s).”

Five consultants expressed their preference for the “paired team of consultants with expertise” model, citing the advantages of the collaborative pair work, the identification of expertise helping clarify and sharpen a school’s LDI goals for the year, and more precise specification of the role of the LDI consultant to that school.

With two people, each person will likely see different aspects of what is going on in each school and can provide different perspectives on how the school can accomplish what it wants to. The building of ideas between two people is always better and more productive than one person trying to do it all alone. It is important, though, that the pairs be well matched and have an understanding of how to work productively together. All of the qualities that make someone a bad consultant will be exacerbated in a pair. Conversely, good consultants working in

pairs can offer a whole lot more to their schools than individuals working alone (3-Year Consultant)

I think having consultants serve as experts in a variety of schools would be the better way to structure this program. That way the role would be clearly defined upon entry (the way it is for literacy and math coaches) and it would give the consultants a broader scope for comparison making [since they would be working with more than one school.] (1-Year Consultant)

One consultant favored the one-consultant model, yet outlined the advantages to each of the two approaches. She favored the “one consultant-one school” since it “forces a consultant to form a professional relationship and to take some responsibility for what’s happening or not” and because “the problems of urban schools are layered and complex; it takes time, patience and persistence to learn a system.” However, she cited reasons for a paired approach if “there is accountability for getting the job done; the expertise is being paired to solve a complex problem, or the building is large, and one consultant can’t get his or her head wrapped around what the leadership team is up against.”

Thus, given that the vast majority of both school participants and consultants report that each of the two models is extremely helpful to LDI schools, it is recommended that both should continue to be presented as options in the program.

3. Examine additional areas of consulting expertise

School participants and consultants were asked if there were areas of consulting expertise that would be useful, beyond the focus on student achievement scores. Other areas of interest mentioned by school participants included: improving school climate, increasing student motivation, discipline, and working with parents and communities. They also felt they could benefit from consultants’ expertise in the areas of literacy and mathematics, and strategies to help teachers stay motivated and focused on achievement. Several mentioned new district initiatives, such as electronic report cards, how to grade “standards-based teaching,” and collaborative coaching models. One participant emphasized the continued importance of team building, and addressed what whole school change might look like in the face of the current fiscal crises.

Consultants also outlined additional areas of expertise that might be offered, while underscoring the preference that these areas need to be defined by the individual schools. These areas included how to: close the school-parent-community gap; bridge chasms between and among teachers of different ages and experience levels, raise funds and

write grants, motivate students to take greater responsibility for their own learning, and deal with issues of student discipline.

One individual spoke about how the consultant needs to understand both the “big picture” of what the district expects and the details of what the school needs to do to meet those expectations. Several discussed the expertise and sensibilities that the consultants need to draw on when handling the delicate and complex relationship between schools and the district administration, and to support school administrators and teachers to become effective instructional leaders:

I believe that Boston needs consultants who have expertise in interpreting data and gathering data. As Boston moves more toward “reading student work,” and “data driven” solutions, it’s unclear who will do those tasks...there needs to be people at the school, and perhaps the LDI can train those data leaders. In addition, there need to be people who will question and interpret these edicts handed down by the district. For instance, what does “looking at student work” really mean? Why does the district require it? How can it be properly implemented in the school, and demonstrated effectively? I believe consultants can fill this gap. (3-Year Consultant)

Boston schools seem desperately in need of energetic, passionate leaders who are strong enough to resist becoming narrow in their focus on “standards” and who are willing to fight hard to develop more positive, collaborative and supportive climates within their schools. I don’t know how much consultants can satisfy this need, but their work should be directed toward encouraging school leaders to be more than just managers. (3-Year Consultant)

At a more basic level, consultants spoke about the ways in which it was essential that the LDI consultants be fully armed with knowledge about the history, background context, and current educational initiatives and “players” in the school district:

There is a lot to learn about working within BPS. For a complete outsider to the system, it takes a long time to figure out what...is going on in Boston. I would suggest that there be a two or three day introduction to LDI for the consultants. ...Part of the job of leadership in BPS is figuring out what is essential and what is chaff and shielding/buffering/ focusing as necessary. (4-Year Consultant)

4. Select schools that demonstrate need and not already represent “best practices” schools

School participants felt that new schools selected for the program should not be ones already identified as “best practices” schools, but rather ones that are “several tiers down—working hard but taking more time to get there.” One head stressed that she did not believe that a school should be part of other major district initiatives, (e.g., Annenberg, 21st Century school, a magnet school), not only because they’re already receiving other forms of support, but also because “if you have three or four masters it is hard to be true to all of them.” Similarly, consultants noted the importance of considering “whether the school already has many resources so that the LDI is not really necessary, versus schools that are under-resourced.” At the same time, one consultant pointed to the need for a minimally sufficient level of resources, such as having enough support to provide classroom coverage for teachers so that the consultant can meet with them in small groups, or so that the principal is able to meet with the consultant.

5. Select schools that demonstrate promise and a vested interest in instructional leadership and shared leadership

A unique feature of the LDI program is its focus on developing teams of educators to assume increasingly active and effective roles as instructional leaders in their schools. Given the challenge and hard work of this endeavor, consultants emphasized the importance of selecting schools that could demonstrate a commitment to engaging in such an enterprise.

Schools need to be devoted to the concept of shared leadership and willing to work consistently to develop better team dynamics. If applicants are only “theoretically” interested in enhancing collaboration and only abstractly intrigued by the notion of “flattening the hierarchy”, then they will not remain invested in the idea of leadership development across the school. (3-Year Consultant)

Look for schools that have: a vision or purpose that is guiding their change process, a belief in their students’ ability to achieve, and respect for the parents and community...Look for a principal who is willing to share leadership and encourage it in others, who believes that teachers, students and parents are capable of working together to achieve educational success, and who is not afraid to try something new, especially if what exists is not working. (5-Year Consultant)

One consultant pointed to one of the current LDI schools as a good model for how schools and the LDI can work together well for the benefits of both. Describing the

leadership qualities of the principal, he said she “has worked at changing the culture, the energy and the academic achievement within her school. She is creative, energetic, persistent, and inspirational in what she does and how she goes about her work. She continually comes up with ideas that bring the LDI resources to the students, staff, and parents in real positive ways...She treats people well, and knows the work it takes to accomplish her goals. She works hard to push others in the school building to take on more responsibility, developing leadership among her staff. The school has a lot they need to accomplish, and I think that [the principal] is making wonderful use of the opportunities that LDI has provided.”

6. Secure school team commitment and clear articulation of goals, and monitor engagement and progress

Participants believed that new schools should be very clear about their ability to commit the time, effort and resources to the program, not only from the head of school, but from a team of individuals. They felt it critical for schools to have a firm multi-year commitment, as well as specific goals they wished to accomplish that were clearly aligned with what the LDI could offer. Several individuals expressed that it was important to see how the work could be connected to the school’s instructional leadership team (ILT) as a critical team structure existing in the school.

Several individuals encouraged a more structured evaluative process for continued participation in the LDI. One school participant emphasized the need for schools to demonstrate growth in order to continue in the program, saying, “People need to show that they’ve benefited that they’ve shown growth. And progress not just on paper, because you can write down anything you want on paper, but they can actually produce something that shows the LDI has helped them... The whole goal is to help you change what you’re doing over time.”

Similarly, consultants also pointed to the value of some type of assessment and reflection process, as well as monitoring some minimal level of engagement. As one consultant said, “While I wouldn’t like to see the LDI become overly evaluative, I think there should be an explicit expectation that the school should be using the resources that the Initiative provides to help improve student outcomes. Maybe we could ask schools to set one or two goals for each year and then to reflect on why and how they reached them—or didn’t—at the end of the year (as part of their summer institute), and then use that reflection to help them plan for next year’s goal(s).”

Another consultant pointed out the value of assessment even if it revealed less than glowing results: “I think it is important to keep records of progress. The process is so

painful that when test scores drop, the tendency is to think that this effort is wasted... It's important to analyze failures, or less-than-full success. Not only can failures be the best lessons, but it is a mechanism to help more senior leaders think through the outcomes of their policies."

7. Carefully Select LDI Consultants

In addition to identifying the areas of expertise future LDI consultants should have, current and former LDI consultants were asked to characterize the kinds of personal qualities should also be sought in its consultants during the selection process.

The personal qualities described fit into three major categories. First, individuals felt that consultants should possess good interpersonal and communication skills; an ability to listen to and engage others. One described how a consultant "needs many interpersonal qualities to build trust within a school, which is a prerequisite for being an effective change agent. Such qualities include openness, humility, warmth, compassion, empathy, reliability, and optimism. In short, a consultant needs to be charismatic and engaging."

Second, consultants should have a commitment and energy to work with schools to help them improve, and "the passion and intellectual ability to wrestle with the difficult problems schools face", as expressed by one consultant. Another spoke about the important consultant qualities of "the ability to listen and push people at the same time; kind; aggressive problem-solvers; [who] believe that what they are doing is fixing a system rather than people...[and with] a track record of getting things done."

Third, consultants should have a humble, respectful and appreciative approach to working with educators. One consultant spoke about how consultants "need to be keenly aware of how busy teachers are, and not be absorbed by the importance of their own job. We need to figure out how to support teachers, not overburden them by giving them even more tasks." Others added:

A consultant has to care about schools and people in them. If a consultant is unable to be respectful of folks who are working in a difficult environment, they are not useful...A consultant has to be willing to roll up his/her sleeves and work to help the school. If that means taking lunch duty one day, you need to do it. If you cannot convince the school people that you are real, then you will not be a good consultant. (4-Year Consultant)

[Consultants should have] a willingness "to learn" from the schools, as much as a willingness "to teach" the staff and administrators about educational practice

and theory. The consultant should never take for granted the exceptional (and substantial) “learned and [earned] wisdom” of those working inside the schools. They’re an exceptional bunch of folks, and they should have ample opportunities to teach us “Harvard” folks as well.... (1-Year Consultant)

Consultants were particularly critical of peers who were not “doers” or not able to give or fulfill long-term commitments to schools. They also disapproved of individuals who seemed self-serving, intellectually arrogant, or were “blindly ambitious networkers.”

Several consultants specifically mentioned the importance of maturity, prior experience with public schools and issues of urban education, and the necessity of an understanding of the communities served by the schools. One consultant emphasized that “you need folks with real urban school experience and expertise...a veteran urban teacher doesn’t want or need ‘support/advice/leadership’ from a very young and green suburban kid.” Another consultant recommended that the schools need more consultants who are “reflective of the communities from which they hail; whether that ‘reflection’ be one that has linguistic relevance, racial, ethnic or cultural relevance, or relevance along lines of social class and sexual orientation.”

One consultant summed up his view of the set of desirable qualities as follows:

I think the most important quality that a consultant—particularly a consultant from Harvard—needs to have is an understanding that you don’t always know best what schools need. Schools don’t work like universities, and schools can’t select whom they work with and whom they teach. What seems easy when you enter a school once a week may be much more difficult [in actuality]. Consultants need to listen, observe, interact, question and explore. Consultants need to be clear that they are consulting—trying to help schools do the things they want to do better—not running the school...Be careful of anybody who seems to be doing this just to pack their resume, or because they think that they know what’s wrong with schools. Take note of people who can allow themselves to be wrong, who can take others’ ideas and make them better, and who can both improvise and be creative in their work. (3-Year Consultant)

CHALLENGES FOR THE LDI

We asked participants what they saw as barriers and challenges for the program, and what kind of district support they needed to sustain their whole school change efforts.

1. Establishing Shared Leadership Teams

In its early years, the LDI focused on team building and shared instructional leadership. A number of LDI workshops presented the notion of how instructional leadership should not only reside in the principal or head of school, but should also be distributed among other administrators and teachers in the school. Several school participants initially participated in the LDI as teachers, but later assumed increasingly broader responsibilities beyond the classroom, either as a literacy specialist for the school, or as a literacy coach for the district. They spoke about important aspects of what they gained from the LDI including how to build successful teams using their improved understanding of group dynamics. This was an important aspect of what they gained from the LDI that was applied at their work.

Few participants mentioned the way the LDI enabled school staff to work better in instructional leadership teams for their school. Participants more typically explained how the LDI team consisted largely of administrators who had school-wide responsibilities, as either the head of school, director of instruction, literacy specialist, and possibly one or two teachers. Additional teachers were involved largely by being invited to participate in selected LDI events, such as workshops or seminars. In almost all the schools, the LDI consultant worked most closely with the head of school, and had varying degrees of contact with other administrators and teachers of the school, depending on the school.

Educators described three main barriers to establishing shared leadership teams: high staff turnover, getting teachers involved in the leadership process, and lack of communication with building and district administration.

One of the main barriers to the formation of strong leadership teams throughout the LDI seemed to be the significant amount of staff turnover in schools, both head administrators as well as other staff. Of the ten original LDI schools, only three schools have the same head of school as they did five years ago when the LDI first began. Of the seven schools that had experienced administrative changes, five had two heads of school during this period, while two schools had three heads of school. For most of the schools, the composition of the LDI team representing the schools changed quite significantly over the years, with typically only one or two of the original members still part of the LDI team. One teacher who was the sole original member of her LDI team noted somewhat

ironically that since the LDI and her school encouraged instructional leadership, four of the five original team members were promoted to higher administrative positions in other schools, or in the district office.

Of the five heads we interviewed, only two were heads of schools since the LDI began five years ago, while three became the heads of their schools as recently as two or three years ago. The stories from three of these schools illustrate the variety of experiences schools had with the LDI leadership teams, and the different challenges they faced.

One head described how the LDI encouraged her to expand her work beyond the administrative team to include more teachers. In this school, teachers were included in the LDI project, but felt that they still had a fairly limited input into any decision-making at the school, and there seemed to be issues in relinquishing power to those outside the core administrative team.

One of the teachers on this team indicated that being involved in the LDI allowed her to see her administrator's colleagues in a somewhat different light, but felt that teachers were still not actively included in the decision-making process.

We [usually] don't really talk in our school, teacher to administrator. You don't really know what's going on in their heads. But being at the LDI session, we came together on the same team. The whole process showed me this is what they're thinking; this is how they interpret something.

[But] I still don't understand the shared leadership system. Because everybody who went from our school knew all the administrators already have the leadership. So when we came back to the school, those few teachers, it wasn't like we were given anything else to do. We would go back and talk about it with our colleagues but that was it...I thought shared leadership meant we're a school, we're going to make decisions together, it's not from the top-down but we're going to come to a consensus as a team who is interested in increasing student performance. But I don't really see it in this school. (High School Teacher)

In another school, a head of school believed in shared leadership and regarded this as one of the strongest features that attracted her to the LDI. However, she found it difficult to encourage her cadre of elementary school teachers to assume more leadership. It seemed the classroom teachers felt overwhelmed by the district's mandated curriculum initiatives in core subject areas. They had little time to assume more tasks and school-wide responsibilities aside from those that were explicitly curriculum-oriented with implications for instruction.

The reason why we joined the LDI was for the teacher leadership piece. That's an added advantage of what the LDI does [beyond what is typically offered in the district.] Unfortunately we don't have a cadre of people who saw that as a priority in our school. People are reluctant now because of competing demands on their time, and inundated with the curriculum... [Those who] would benefit from working with the LDI in developing those innate teacher leadership skills are probably the folks who are most conscientious about their teaching... They come and give two hours of their time to make those instructional decisions, but their interest is much more around the curriculum. When it comes to the administrative kinds of things, they look at me and say, "Well, that's your job."

I have a group of people that I really think have the potential to take the leadership role and feel like they are making some solid decisions about the school, how the school runs, and what goes on in the instructional day. But they are much more concerned about how they are going to survive in the classroom. They're not interested in the leadership part of it. (Elementary School Principal)

Furthermore, she pointed out that teachers, particularly those who are working parents, found the additional time required for the LDI possible to commit to for a few years, but difficult to sustain over the five years of the project. This problem was exacerbated by her having a very small school, with a quite limited pool of faculty from which to draw upon.

A third head joined the LDI as a lead teacher when it began. Over the years, she had taken on increasing responsibilities, moving to lead teacher, acting principal, and now to an appointed principal position at a new school. Her former head had mentored her and many of her colleagues in shared leadership. As a result, she was a strong proponent of the approach, and actively engaged a number of teacher colleagues in the instructional leadership of her new school, with deep commitment, convictions, and action.

Leadership must be shared... The staff has taken ownership for the many different areas of concern in the school, from policy to procedural things... When I became a principal here, I begged LDI to [let us] come in, because I had seen how the team at the [previous] school helped to move the staff, to move the students... I brought a team of people with me to LDI from this school. I started seeing positive changes... [and others have as well.] The superintendent was here. He had so many praises for what is taking place because this was one of the schools they were going to give up and give over to private leadership. It's powerful [what changes have happened in just two years.] I said recently to someone, "If

they could do this for every new principal that comes into the system, starting fresh, it would mean so much.”

The experiences in these three schools, as well as those observed in the other LDI schools, points to the potential as well as the challenge of shared instructional leadership. A teacher and a consultant expressed the challenge as follows:

I think one of the most important things the LDI did in the first couple of years was that whole concept of team building and having conversations. It is important for new schools to be offered information with absolute clarity...People need to be concrete, especially teachers. They need to know what are the goals, what's the purpose of this? You can't just start saying, "Well, OK, everybody's on here and they know what it's for," because they don't. So a barrier [to the program's success] could be lack of communication or the concept of teams. (Elementary School Teacher)

In terms of leadership, I think that it is crucial for LDI to be explicit about what leadership means and what it is that we are trying to develop. Is leadership about people in power? Is leadership about developing the skills of the people at the top of the hierarchy? Or is leadership about each person in a school taking on a project or being responsible for a particular aspect of the school's functioning? Or can we look at each teacher in the school as a leader because of her/his responsibility for students' learning and development, and work to make each teacher better at what she/he does? Or is leadership something much more personal? (3-Year Consultant)

Teachers wondered: What does it mean to be an instructional leader when one is a teacher? Do you focus on your students' learning in your classroom? Make decisions as part of ILT? Contribute to decisions and process as part of administrative leadership team? It was relatively rare for LDI teachers to play active roles in the decision-making process. Some teachers who displayed promise in this area were often transferred, promoted to new positions in district, or to other schools. Thus, there was great evidence that the LDI was building new leaders in the district, but it did not necessarily change how things are done in the individual LDI schools.

The potential of LDI teachers' greater involvement in instructional decisions seemed to increase when LDI teachers were also members of their schools Instructional Leadership Teams (ILT's). It was, however, beyond the scope of the current evaluation to closely examine the degree to which LDI participation enabled these teachers to assume more effective and collaborative roles in their school's decision-making process.

One teacher interviewed had actively participated in the LDI for the full five years, and spoke about the ways in which the LDI allowed her to dramatically shift her perspective as an educator, and take greater responsibilities in the school as an instructional leader. At the same time, she noted that she was the sole remaining member of the LDI team, with many of her original colleagues now promoted to administrative positions in other schools in the district. She raised the legitimate question of how to continue team building when the team keeps on changing, due to promotions, retirement, turnover, and lay-offs.

2. Whole School Change Over Time: Year to Year, Week to Week, Day to Day

According to both school participants and consultants, the LDI offered a valuable opportunity for educators to come together with time to think about their hopes, goals and plans for the coming year, particularly as they met during its Summer Institutes and staff retreats.

Both groups, however, acknowledged the difficulty of the participating educators advancing their goals and objectives once they were back in their school settings, confronted with the multitude of teaching and administrative duties and day-to-day tasks and crises. In this respect, it appeared that three components of the LDI program helped maximize the potential of LDI learning taking hold in the school's policies and practices:

- 1) The presence of the regular LDI consultant who met with the school LDI team on a weekly basis and offered a continuing source of encouragement, support and perseverance to stay-on-task;
- 2) The resources offered by Harvard faculty and other consultants to offer special training or sessions to advance a school's specific issue with the broader faculty, and parents and students; and,
- 3) The opportunity to meet as a team for LDI sessions off-site away from their schools, where they could take the time to learn about critical educational issues, and seriously discuss and focus on the school change work they were seeking to advance.

One elementary school principal, firm in her belief in the importance of educators being well grounded in educational research and theory, stressed the advantages of off-site opportunities to learn and critically assess their school. As she expressed, "[There was real] value in our getting away from Boston Public Schools to another environment. Most

of the professional development in Boston provided from the district is more ‘how-to’ rather than real grounding in the research and understanding how learning happens...In my own school I try to provide them with some of that foundation, [but] we are still busy with the day-to-day work and needing to see some of the practicality of the ‘how-to’s.’ [It’s been important] to get away from our school and have some of the LDI program offerings.”

Other program elements that participants suggested would bolster building-level efforts around school change include the greater specification of particular goals the LDI team wishes to accomplish each year, some assessment and tracking of progress of those goals built into the LDI program process, and greater integration of the LDI team members with the schools’ Instructional Leadership Teams.

Individuals also spoke about increasing the probability of following through on LDI team goals and actions by aligning the LDI team’s agenda with the high priority school-based plans and actions required by the district in a given year, such as the required professional development plan in their Whole School Improvement Plan (WSIP). One consultant strongly advised that the LDI consultant be part of these conversations related to the WSIP to help establish a solid link between the LDI, school and district, and encourage schools to be very specific about how the LDI can help the school address one or more of the district’s “six essentials” of the school reform agenda, and maximize the success of the LDI program in a school.

Somewhat paradoxically, as slow a process as school change is, other aspects of the life of a school can seem to change quite rapidly. Some LDI schools experienced a succession of school leaders, while others noted the anticipated changes in the composition of their teaching force over the next five years, with veteran teachers retiring. Others described changes in the district initiatives and funding support, and how these affected LDI participants. One LDI consultant described how her school team worked hard over the year to chose from a small set of district-suggested literacy programs to select one that would best meet its students’ needs, only to find the next year the district made a decision to change which literacy program should be used. Another consultant urged the requirement that the LDI to be in touch with BPS to keep track of multiple changes and mandates as they happen.

Several school administrators and teachers described how the multi-year LDI program provided them with much needed continuity and expertise. One elementary school teacher spoke about how the workshops, presentations and seminars offered an important breadth and depth of professional development offerings, in a thoughtful, sustained manner: “LDI is able to look at education and schools through multiple lenses and that’s

not something that you normally receive from other kinds of professional development...It doesn't operate on a workshop mentality, which is also not typical. And it also seemed to have basic themes that they maintained throughout the five years, which is highly unusual."

A high school teacher pointed to the important role and services provided by the LDI consultants to keep up with the changes in the district, saying "Boston is forever changing, and it's changed so much in such a short amount of time that a lot of people don't have the expertise or the time to do what the consultants do."

One middle school administrator, who experienced three changes in her head of school in the past five years, simply stated, "In all the instability, it [the LDI] has given me stability."

3. District Support and Educational Infrastructure

The presence of district-level support was an important factor in how successful school participants and consultants viewed their LDI work. The success of the LDI, and the extent to which it positively increased leadership capabilities of individuals and schools, can be either bolstered, or hindered, by the degree to which the LDI objectives are supported by the district administration and policies.

First of all, participants appreciated the presence of key district leaders, such as the superintendent, deputy superintendent, and head of the Center for Leadership Development, at LDI events, and their acknowledgement of the LDI program. One teacher spoke about how her contact with the superintendent at one of these events "was one of the few times within an intimate group being able to talk to him, to listen to him, ask questions."

Others desired for the district administrators to be more than simply present and aware of the LDI. They wanted district administrators to be more actively supportive of the LDI schools' efforts, and pro-active in the district in gaining greater district level awareness and support of the goals, policies and actions of a LDI school team.

Consultants, in particular, spoke about how the LDI's effectiveness was affected by aspects of the district and schools' organizational structure and staffing, particularly its educational infrastructure. Over the past five years, LDI consultants first worked in LDI schools as the sole, ongoing facilitator for school change, and then in years two-through-five learned to work closely with, and coordinate their role and responsibilities with a school's district-appointed literacy coach and whole school change coach. (In some

cases, LDI consultants officially expanded their role and were hired by the district to take on those additional coaching roles as well.) Now, at the end of Year Five, whole school change coaches will not be present in most schools due to district budget cuts and priorities. Several consultants described how, given the absence of the change coach positions in schools, LDI consultants would need to have some background and practice with defining and implementing a change process, and have a vital role to play in whole school improvement in schools.

One LDI consultant stressed that in order to achieve shared leadership in schools, greater district commitment and resources were needed to expand and enhance a school's administrative infrastructure:

If the BPS is seriously committed to promoting shared leadership in the school, then it should prioritize the development and implementation of collaborative models of instructional leadership. This means providing more administrative support for principals and headmasters, so that others might be empowered to initiate positive change in instructional areas. For example, there should be more department heads and program coordinators available to oversee and support classroom teachers. Without such administrative personnel, it is very hard to build a team leadership approach that has any kind of practical influence over the day-to-day delivery of instruction. (3-Year Consultant)

These challenges are heightened in a climate of BPS's limited financial resources, as reflected by the elimination of positions such as whole school change coaches and literacy specialists in schools. One teacher felt that, "In the face of fiscal crisis, it's difficult to implement whole school change. It's the last of everyone's priorities. Whole school change means something very different when there's a budget crunch."

Finally, several consultants discussed what the optimal relationship between the LDI and the district office might be. On the one hand, it was clear that there were distinct advantages for the LDI staff to be an autonomous group distinct from the Boston Public School district administration. LDI's autonomy helped promote an atmosphere of trust and honest exchange, leading school participants to view the LDI as a true advocate for the school.

At the same time, consultants recognized that through their close working with schools, they often had a good understanding of the real progress groups were making toward improving their school, and wondered how the information gained could better serve schools and the district. As proposed by one consultant, "I think it is important that LDI and BPS work more closely together. We are in a number of schools and have a great

deal of knowledge about what these schools are trying to do and what their challenges are in accomplishing these goals. I think that we could work with BPS to share information and be able to advocate for schools with BPS.”

One consultant expressed the optimal relationship in the following way: “In the best case scenario, we will help the schools get the results that will satisfy BPS in ways that honor a developing and expanding leadership within the school.”

4. The Difficulty of Change—In Schools and In Individuals

Finally, some educators conveyed the challenges posed by the resistance to change, both in schools as institutions, and in educators as individuals. As expressed by one high school teacher, somewhat frustrated by some of her teaching colleagues’ resistance to change, “Some barriers to school change in general are teachers who don’t want to change. If you don’t have a group of leaders who are willing to bully people to change, then some people are just not willing to change. And if you can’t present enough evidence to show the benefits of change, then there’s no need to change.”

At the same time, participants believed that various aspects of the LDI were significant steps to combating that resistance—from exposing educators to research-based knowledge about student learning, educational leadership, and school improvement, to opening up the LDI beyond the small immediate school improvement team to members of its faculty, students, and school community.

I think one of the barriers for whole school change is people’s reluctance to change. And teachers are being asked to make a lot of change. I think it’s particularly difficult for teachers who have been around for awhile...[I suggest] to find ways to be more in the schools, to have the experts coming into our schools to talk. I feel it makes a difference in terms of people feeling that they are connected. That this isn’t just something from outside. I think that you need that because if people perceive this as something extra to do, there’s reluctance. But if they perceive it as “this helps us to do what we have to do anyway” then people buy into it. (Former Teacher, now Elementary School Vice Principal)

The LDI provided a space for teachers and administrators to validate their insights, concerns, challenges and hopes with professionals from other schools. Participation in the LDI helped expand people’s perspectives and offered inspiring examples of programs and approaches that work, even in the most difficult circumstances. (3-Year Consultant)

SUMMARY AND CONCLUSION

The Boston-Harvard Leadership Development Initiative (LDI) successfully engaged, informed, and motivated its BPS school-site participants to change their strategies and practices for whole school reform. Furthermore, many of the LDI educators grew professionally and took on new responsibilities and new positions within the district. The cadre of past participants is playing—and will play—an important role in BPS over the coming decades.

At the same time, students at the Harvard Graduate School of Education benefited from the opportunity to utilize their classroom knowledge in an applied setting and contribute to the school change process. HGSE faculty also found a chance to link their research and theory to school operations and instructional practice. The five years of support from FleetBoston Financial Foundation and Harvard University provided great value in this local effort to build site-base leadership and facilitate substantive school change. The evidence gathered over the past two years in this external evaluation clearly supports these conclusions.

That isn't to say that the LDI didn't have to overcome numerous challenges during its implementation. Some of the shared leadership teams faced high turnover rates, others had difficulty getting teachers involved in the leadership process, and there was an occasional lack of communication with building and district administrators. School sites had varied levels of district support and infrastructure. Educators were not always able to implement what they learned at the LDI offsite workshops and gatherings, and resistance to change was encountered at both the school and individual levels. Each of these challenges had the potential to derail the LDI. Yet, due to the dedication and perseverance of the LDI teams, none of these challenges were great enough to stop the momentum and progress of the group.

Our data from the final two years of the program indicate that there is a core set of LDI program characteristics that enabled the participating educators to take on the important, yet formidable challenge of building the leadership capacity. Through its summer institutes, workshops and seminars, and LDI consultants and faculty, the LDI program provided school professionals with a diverse range of program components deemed highly valuable. One central component was the help provided by the doctoral students serving as LDI consultants.

The benefits identified by the school participants included:

- a research-based grounding and real-life exemplars of whole school change and instructional leadership;
- a knowledgeable and personalized “outsider’s perspective” on school issues;
- significant assistance and training in the analysis of student assessment data;
- practical skills around communication, collaboration, and school climate; and
- a support network of educators exploring instructional leadership and whole school change.

School administrators and teachers who were engaged in LDI over the past several years also offered feedback about program modifications under consideration for the future. They endorsed the LDI director’s proposal of a shorter, three-year period for school involvement, and indicated that both the regular “weekly” model and paired expertise model of LDI consultant support should continue to be offered as options to schools. Educators and consultants also recommended greater specification of goals, outcomes, and a secured commitment from both school administrators and teams for LDI participation and use of the LDI consultant; a yearly process of reflection and assessment of LDI team progress; and increased support from the district administration.

Based on the findings from the final Year 5 evaluation, coupled with our Year 4 evaluation, we strongly recommend that the LDI’s comprehensive, multi-year model of professional development and support around instructional leadership continue. In the Boston Public Schools, school-site leadership is the key to improving students’ academic achievement. The LDI has proven to be a valuable catalyst to shape new school leaders and leadership teams—educators who build on research and theory to make change. The LDI provides an integral system of support that serves to sustain schools’ progress in building school-site leadership.