



FUND FOR
EDUCATIONAL
EXCELLENCE

Portfolio Management

Graduating Great Kids Summit

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Outline

- Fund's Current High Impact Areas
- New School Creation in Baltimore City
- 2002-2007 High School Reform Accomplishments
- Move to Portfolio Management Approach
- Portfolio Management Findings



Fund's High Impact Areas

- **Fostering Sustainable Reform**
 - Policies, Practices, and Structures
 - Systemic Work
- **Developing Human Capital**
 - People doing the work
 - Systemic and School-Based Work
- **Engaging Community to be part of the Solution**
 - Fiscal and Technical Expertise
 - Connecting resources, partners and ideas to each other and to the City Schools



Baltimore's Story-High Level

- 1995: Court ordered Baltimore to create a “New Schools Initiative” as a remedy for on-going lawsuit about encouraging inclusionary practices for special education students
- 1996: New Schools Advisory Board formed to develop a process to recruit and select potential new school operators. The Board then makes recommendation to Superintendent/CEO and Board of School Commissioners
- 2001: Last new school contract awarded
- 2002: Five-year High School Reform Initiative begins to restructure large comprehensive high schools (5 restructured) and create up to 6 new Innovation Schools (6 created)



Baltimore's Story-High Level

- 2003: State of Maryland passes a comparatively weak charter law, with local school boards as primary authorizers (with appeal to state possible)
- 2005: High School (Reform) Steering Committee commissions two white papers on Choice for Dr. Copeland
- 2006: District moves to citywide high school choice for all rising ninth-graders for both entrance criteria and non-entrance criteria schools
- 2007: Dr. Alonso arrives and pledges to open up to 24 new Secondary Transformation Schools (serving grades 6-12)



Baltimore's Story-High Level

- 2008: District initiates middle grade choice with a focus on new Secondary Transformation Schools and greatly expands Early Learning Choice with the expansion of pre-K
- 2009: Baltimore now has 27 charters, by far the most in the state
- 2009: Baltimore now has 13 Secondary Transformation Schools (including conversions); more to open in 2010
- 2010-2011: Targeted operators for accelerator (under-age, over-credited kids) and learning to work models to compliment existing college prep. schools



2002-2007 High School Reform Accomplishments

- Created 6 new Innovation high schools & restructured 5 traditional high schools
- Revamped curriculum and professional development
- Graduation and attendance rates increased
- College scholarships increased
- SAT and Advanced Placement participation increased
- Instituted citywide high school choice



Baltimore's Story-Choice Over Time

- 2006-07: 88.3% of rising 9th graders chose
- 2007-08: 90.7% of rising 9th graders chose
- 2008-09: 91.2% of rising 9th graders chose
- 2009-10: 96.8% of rising 9th graders chose
- 2009-10: 76% of rising 9th graders were matched to 1st or 2nd choice



Lessons Learned Here & Elsewhere

- **New schools alone aren't enough for cities**
- **New schools can be catalysts for new structures and policies that benefit all schools**
- **Choice often works best at the neighborhood level**
- **Schools' role becomes one of managing instruction**
- **Districts' role becomes one of managing the portfolio**



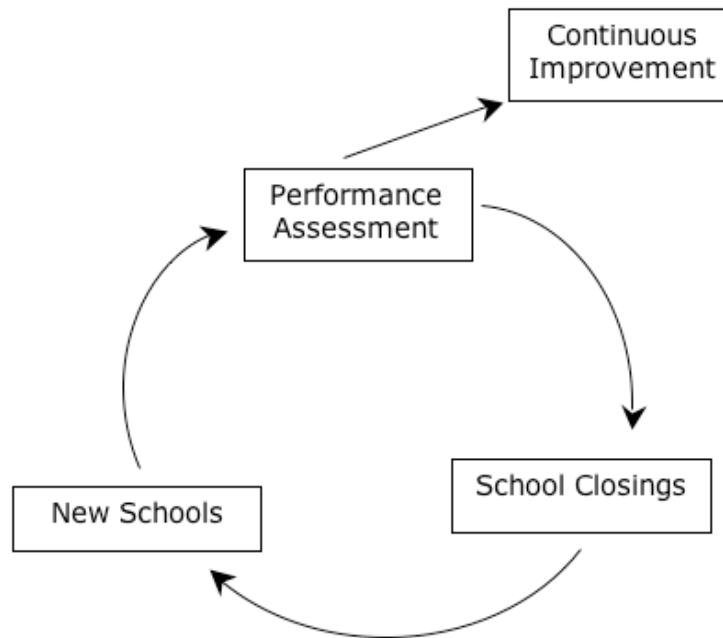
Portfolio Management

- Grew out of: common standards and assessments, decentralization, accountability & variability in programming because of charters*
- Dr. Paul Hill/Center on Reinventing Public Education
- National expert on choice and charters
- Now studying New Orleans, NYC, Chicago, DC, and Denver
- Convening a network of portfolio districts

*Portfolio School Districts for Big Cities: An Interim Report, October 2009 (p. 6)



Dr. Hill's Initial Findings: Continuous Improvement*



*Portfolio School Districts for Big Cities: An Interim Report, October 2009 (p. 17)



Dr. Hill's Initial Findings: Elements*

*Portfolio School Districts for Big Cities: An Interim Report, October 2009 (p. 18)

New Schools	Closing Unproductive Schools	Data-Based Decisions
New school providers	Portfolio management	Longitudinal performance data
External assist. providers	Family choice	Independent analytical capability
Talent strategy	Pupil-based funding/devolution of resources	Formal accountability system
New employment terms for teachers	Systems for shifting funds	
New approach to facilities		
Links between old and new cultures		



Selected Work by Dr. Paul Hill

- **School Choice: Doing It the Right Way Makes a Difference (2003)**
- **Strengthening Title I To Help High-Poverty Schools: How Title I Funds Fit Into District Allocation - Research Brief (2005)**
- **Poor Parents Can Be Good Choosers (2006)**
- **A District-Level Simulation to Help Officials Reallocate Resources to Support Instructional Goals: The ERS District Resource Allocation Modeler (DREAM) (2007)**
- **Funding Student Learning: How to Align Education Resources with Student Learning Goals (2008)**
- **Drivers of Choice: Parents, Transportation, & School Choice (2009)**
- **Performance Management in Portfolio School Districts (2009)**