

**THE BOSTON SCHOOL LEADERSHIP INSTITUTE:
2004-2005 EVALUATION REPORT**

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TABLE OF CONTENTS

I. INTRODUCTION	1
Overview of the Findings	3
II. THE BOSTON PRINCIPAL FELLOWS PROGRAM	7
A. The Cohort of Fellows	10
B. School Residency	14
Making the Mentor-Fellow Match	14
Work in the Residency	16
Scaling-Up Instructional Improvement	20
Fellow-Mentor Relationship: Keeping the Conversation Going	23
Balancing Time for the Residency and Course Work	25
C. Course Work, Seminars, and Assignments	26
Scheduling of Courses	28
Pedagogy	30
The Portfolio and Capstone Presentation	33
The Leadership Modules	35
The Seminar	38
D. Conclusions	42
III. THE NEW PRINCIPAL SUPPORT SYSTEM	50
A. The New Principal Institute	54
B. The New Principal Network	57
Forming a Learning Community	57
Finding the Right Topics	59
Time as a Factor in Attending the Network	60
C. Mentoring Support	63
D. Conclusions	70
IV. EXPLORING THE PRINCIPALSHIP	72
A. The EPP as a Recruiting Tool for BPS	75
B. EPP: Design and Implementation	79
C. Conclusions and Recommendations	90
V. NEXT STEPS	95
APPENDIX A: Evaluation Questions	

I. INTRODUCTION

Education Matters' Inc. began collecting data with which to evaluate Boston's School Leadership Institute (SLI) in the summer of 2004 with an evaluation design that focused on all three components of the SLI: the Boston Principal Fellows Program (BPF), the New Principal Support System (NPSS), and the Exploring the Principalship Program (EPP). Each of the programs within the SLI has a unique purpose and set of goals related to increasing leadership knowledge and skill within the BPS.

To be more specific, the purpose of the BPF is to prepare the next generation of schools leaders for the BPS. This intensive 12-month program provides Fellows with relevant course work coupled with a residency placement with a successful Boston principal as a setting to apply their learning. The curriculum is centered around Boston's six Essentials of Whole School Improvement and focuses on ensuring that new principals deeply understand the district's focus on instruction and how to organize a school around student learning. Participants receive a full-time salary during their fellowship in return for a three-year commitment to BPS after completing the program. Graduating Fellows can receive a master's degree or certificate of advanced graduate studies. The Boston Principal Fellowship distinguishes Boston as one of the few school systems in the country to have a district-based principal certification program that has been recognized nationally as a promising model for principal preparation. Ten to twelve fellowships are awarded annually.

The purpose of the NPSS is to support new principals in becoming strong school leaders. NPSS aspires to create a customized system of support and a learning community for principals in their first two years in the position. The NPSS includes mentoring by successful principals, monthly seminars, and school-based consultations to address the challenges and obstacles faced by novice principals. This program serves 25 first- and second-year principals. Our evaluation focused on the program's work with first-year principals.

The EPP program is designed to introduce those with leadership potential and deep knowledge of instruction to the principalship. Exploring the Principalship focuses on those who have this potential but have not considered becoming a principal. This program includes learning about the principalship from successful principals, from district-level administrators, and by examining case studies of Boston schools and their leaders. This program serves 35-40 annually. (See Appendix A for the evaluation questions related to each of the SLI's components.)

Education Matters developed a specific evaluation design for each component of the program in light of its overall purpose. With respect to the BPF, in agreement with the SLI leadership, Education Matters' researchers focused on six Fellows of the program's nine Fellows who were chosen to reflect all three levels of schooling in which the Fellows worked, their prior experience, and the ethnic/racial diversity of the cohort. We interviewed each Fellow three times

and interviewed their mentors twice.¹ We observed three course/orientation sessions and one mentor-Fellow meeting during the summer of 2004, and four course meetings of four different courses during the school year. In addition, we observed two mentor meetings, three mentor-pair training sessions, and two seminar sessions. Mentor-pair training sessions included new principals and their mentors, as well. Therefore, we gathered data on both the BPF and the NPSS at these sessions. During the spring of 2005, we interviewed each of the four faculty members who taught the courses we had observed. Finally, we read program documents throughout the course of the year.

With respect to the NPSS, we followed a sample of nine new principals. Three were BPF graduates, three were internal BPS promotions, and three were new principals whose last position was outside of Boston. Our goal was to understand their needs as first-year principals, determine whether those needs were related to their prior experiences, and determine the extent to which the NPSS was addressing those needs. Data collection included two interviews with each new principal, two interviews with each of their mentors, and, at each of the new principals' schools, an observation of an Instructional Leadership Team meeting (ILT) and interviews with one or two coaches and/or teachers. In addition, we observed a portion of the summer New Principal Institute, the introductory meeting for new principal mentors, and two New Principal Network meetings during the school year. Finally, we developed a quantitative data base with which the SLI could keep track of the progress of the district's new principals in order to determine the effectiveness of the NPSS in light of new principals' prior experiences.

With respect to the EPP component of the SLI, Education Matters' researchers observed four EPP sessions, interviewed eight participants near the end of the program, and reviewed the paper and pencil evaluation surveys completed at the end of each session (N = 174). We also reviewed the responses of three participants to a more detailed survey that was designed to give SLI staff information for a newsletter article on the EPP program, and we interviewed Rachel Curtis, the SLI Executive Director, and Khita Pottinger, the SLI Program Coordinator who organized and facilitated the EPP program. We also prepared an analysis of participant characteristics that enabled us to answer questions about who was participating in the program in light of its recruitment goals.

With respect to all components of the SLI, we conducted formal interviews with the Executive Director three times and engaged in informal conversations with her during the course of our various observations. We interviewed the Program Coordinator once with special emphasis on her work with the EPP.

In February 2005, we completed a mid-year memo that focused on the BPF program, the most intensive component of the SLI. It was based on data collected during the summer of 2004 and the first half of the 2004-2005 school year from six of the nine Fellows and their mentors. This

¹One Fellow in our sample withdrew from the BPF. As a result, we had to replace that Fellow and were able to conduct only two interviews with her during the year. The mentor, however, was interviewed twice as were the other five mentors.

memo emphasized the Fellows' and mentors' experiences at their schools and addressed the program's efforts to create and maintain a strong cohort of Fellows, a goal that was important to the program's Executive Director.

Early in June 2005, we completed the baseline quantitative analysis of the schools in which a sample of first-year principals are working. These data reflect conditions/achievement in the schools during the 2003-2004 school year, the year before the new principals began their leadership positions. These data will be updated each of the next three years to determine trends in achievement and other school-related variables. To preserve the confidentiality of the principals in our sample, we do not include these data in this report.

This first evaluation report presents our conclusions about the SLI's three program components as of the end of the 2004-2005 school year. The report is divided into sections that reflect each of the components. Section II focuses on the BPF program; Section III focuses on the NPSS; and Section IV focuses on the EPP. We conclude the report with Section IV, an overview of what we learned from this first year of evaluation.

In order to preserve the confidentiality of the Fellows, new principals, and mentors who donated their time and insights to the evaluation, we have not used participants' names (except for the Executive Director and Program Director, and refer to all Fellows, mentors, and new principals using the pronoun "she." Where necessary and where doing so would not change the meaning of participants' words, we have deleted identifying comments from quotations. Where using a quotation or example would reveal a participant's identity, we refrained from using the example or quotation. To the extent possible, we did not use instructors names in this report. However, we know that Fellows' comments about course content likely reveal some identities. Where we do use names, it is with the instructors' permission. In addition, in light of the importance of discussing the leadership modules in the context of the BPF program, and the impossibility of disguising the instructor's identity, we used his name.

Before turning to our findings about each of the SLI program components, we present a brief overview of the findings.

Overview of the Findings

With respect to the BPF:

- The BPF component of the SLI was successful in providing Fellows with a broad set of school-based experiences from which they could learn what they needed to know to begin their careers as school leaders. The program engaged Fellows in a meaningful set of courses designed to extend and deepen the knowledge they will need to serve as high quality instructional leaders in Boston. And, the program helped them to develop and sustain a cohort experience that offered support during the residency year.
- The nine Fellows responded well to the initial intensive summer work and, with the help of program faculty and leadership, developed into a cohort of considerable ethnic, racial,

experiential, personality, and age diversity. All six of the Fellows in our sample concluded that, despite some challenging moments throughout the year, their cohort membership mattered, had value for their work in the program, and would be of value professionally for years to come.

- Mentors worked hard to provide the Fellows with a wide range of learning opportunities. Mentors valued the BPF program and looked forward to mentoring additional Fellows in the future.
- By early in the school year, Fellows were engaged in operational work such as supervising dismissal and in instructional work that included observing and providing feedback to teachers and, at times, participating in formal teacher evaluations. Fellows participated in and co-facilitated Collaborative Coaching and Learning (CCL) cycles. They formulated plans for and implemented activities designed to engage families and the broader community in the work of the schools, and they facilitated Instructional Leadership Team (ILT) meetings. Most Fellows were involved in the preparation of their schools' Whole-School Improvement Plans (WSIP). By the end of the school year, Fellows had chosen and implemented work designed to fulfill their *Scaling Up Instructional Improvement (SUII)* cornerstone. This broad range of school-based work aligned with the SLI cornerstones and with key components of Boston's Whole-School Improvement agenda.
- By and large, Fellows valued what they learned in their classes and could make direct links between a great deal of the courses' content and what they needed to know for their residency work. However, they also raised concerns about a) the links between particular course content and their future work as principals, b) course assignments that took a great deal of time and that they saw as only tangentially related to what they would need as principals, c) the seminar as a forum for Fellows' learning, and d) the value of the portfolio and capstone presentations.
- The program's Executive Director, Coordinator, faculty, and mentors were responsive to Fellows' concerns and, whenever possible, made program accommodations to support their learning.

With respect to the NPSS:

- The key challenge for the summer New Principal Institute's developers was to provide a diverse group of new principals with an orientation to the BPS and to the principalship in the district. Our data lead us to conclude that the Institute's practical focus on entry engaged the full group and served as effective preparation for the school year. New Principal Institute sessions that provided an overview of the district's departments and instructional approach, however, were less useful to most of the principals in our sample.

- More than half of the new principals in our sample reported that the monthly New Principal Network meetings were quite beneficial to them in their first year. These new principals identified two main Network benefits: 1) the value of coming together to learn with a group of first-year colleagues, and 2) the importance of the topics that were addressed in Network meetings. Other new principals reported that the specific topics presented and/or the way in which they were presented were of less use to them.
- The BPS provides all of its principals, new and experienced, with a myriad of opportunities to work with and learn with colleagues. The New Principal Network is one of them, the one focused specifically on new principals. While our data confirm that some new principals found that the Network complemented the other supports, the monthly Network meetings were, in effect, an add-on to an already full slate of professional development activities, some of which new principals found to be more useful than the support provided by the Network. In the 2004-2005 school year, NPSS had not yet developed its niche within the context of the array of supports and professional development provided within the district.
- Of the three components that comprise the NPSS, mentoring provided the greatest level of and most useful support to new principals in our sample. The effectiveness of mentoring rested upon mentors' ability to provide targeted, individualized support to the new principals.

With respect to the EPP:

- The EPP program achieved its purposes with respect to recruitment. Participants were interested in the principalship, wanted to learn more about its specific parameters in the Boston context, and 15 of the 37 participants, 41%, actually applied to the BPF. Three out of eleven of the BPF cohort for the 2005-2006 school year were selected from participants in the EPP. In addition, it seems promising given the EPP's goal of attracting people of color to the principalship that 60% of the BPF applicants were people of color as were two of the three who were admitted to the program.
- Virtually all participants reported that the presenters, particularly principals, both inspired them and greatly informed their view of the principalship. They appreciated hearing the opinions and perspectives of current district-level and school-level leaders.
- Overall, participants found the session topics to be appropriate and helpful in building their understanding of the principalship in Boston.
- Site visits to schools served as a positive, synthesizing culmination activity for participants in the EPP.
- As a result of the EPP, participants left the workshop series feeling motivated and excited about their futures and with a better understanding of the complexity of the principalship.

While not all participants felt ready to take on the principalship immediately, most participants had a clear idea of how to proceed in that direction – whether that meant going back to school, pursuing alternate pathways to the principalship, or continuing to teach for the time being.

This evaluation report focuses on the three, distinct programs included in the School Leadership Institute. To facilitate its usefulness, we have formatted it so that each program component evaluation section can be read alone. To this end, each section begins with a cover page and a restatement of the evaluation findings presented in this introduction.

THE BOSTON SCHOOL LEADERSHIP INSTITUTE:
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Section II
The Boston Principal Fellows Program

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II. THE BOSTON PRINCIPAL FELLOWS PROGRAM²

The purpose of the BPF is to prepare the next generation of schools leaders for the BPS. This intensive 12-month program provides Fellows with relevant course work coupled with a residency placement with a successful Boston principal as a setting to apply their learning. The curriculum is centered around Boston's six Essentials of Whole School Improvement and focuses on ensuring that new principals deeply understand the district's focus on instruction and how to organize a school around student learning. Participants receive a full-time salary during their fellowship in return for a three-year commitment to BPS after completing the program. Graduating Fellows can receive a master's degree or certificate of advanced graduate studies. The Boston Principal Fellowship distinguishes Boston as one of the few school systems in the country to have a district-based principal certification program that has been recognized nationally as a promising model for principal preparation. Ten to twelve fellowships are awarded annually.

The Boston Principal Fellows Program Handbook divides the program into three major components designed to prepare fellows for the principalship: 1) Cohort, 2) Residency, and 3) Coursework and Seminars. Each component is integral to the program's success. The cohort, according to the BPF Handbook:

serves as a lab where Fellows can practice their skills of organizational analysis and development, and leadership. It is here that they learn to build a healthy, supportive culture that is focused on ensuring that each Fellow builds the skills necessary for success as a school leader. Fellows assume leadership roles in the cohort as they design, facilitate, and teach learning seminars. (No page numbers)³

The residency, which places Fellows in a high-performing school for approximately four days/week for the school year, is designed to "bring the Fellowship to life." During this experience:

Fellows learn from principals who have demonstrated success in building an environment of high expectations and continuous learning for both the students and adults in their schools. With the help of their mentors and SLI staff, Fellows shape their role in the residency. While there are opportunities for observing leadership in the residency throughout the year, Fellows need to be able to quickly assume the work of leading. (No page numbers)

Finally, the course work component of the program "provides Fellows with research-based theory of effective schooling and school leadership." According to the BPF Handbook:

²We include findings from the mid-year BPF report in this year-one report so that the findings for the entire school year will be available in one document.

³We consider the Fellows' work in seminars as part of our discussion of program course work.

This theory is presented through courses and modules, which introduce the theory and then ask Fellows to apply it in the context of their residency. The theory provided through the coursework helps Fellows develop a deeper understanding of the elements of effective school leadership. All of the course assignments ask Fellows to apply the course learning in the residency either by engaging in a project at the school or by analyzing and reflecting on some aspect of the school's culture and/or work. (No page numbers)

Each of these program components was attended to carefully by the program's leadership and faculty with changes for the 2004-2005 school year implemented in light of the experiences of the first cohort of Fellows. We have organized our findings to address each of these components in turn. In addition, we discuss some of the challenges a program as intensive as the BPF is likely to continue to face and some that might be reduced by further design considerations. We conclude the section with a discussion of the program's impact by the end of the Fellowship year.

Overview of the Evaluation Findings.

- The BPF component of the SLI was successful in providing Fellows with a broad set of school-based experiences from which they could learn what they needed to know to begin their careers as school leaders. The program engaged Fellows in a meaningful set of courses designed to extend and deepen the knowledge they will need to serve as high quality instructional leaders in Boston. And, the program helped them to develop and sustain a cohort experience that offered support during the residency year.
- The nine Fellows responded well to the initial intensive summer work and, with the help of program faculty and leadership, developed into a cohort of considerable ethnic, racial, experiential, personality, and age diversity. All six of the Fellows in our sample concluded that, despite some challenging moments throughout the year, their cohort membership mattered, had value for their work in the program, and would be of value professionally for years to come.
- Mentors worked hard to provide the Fellows with a wide range of learning opportunities. Mentors valued the BPF program and looked forward to mentoring additional Fellows in the future.
- By early in the school year, Fellows were engaged in operational work such as supervising dismissal and in instructional work that included observing and providing feedback to teachers and, at times, participating in formal teacher evaluations. Fellows participated in and co-facilitated Collaborative Coaching and Learning (CCL) cycles. They formulated plans for and implemented activities designed to engage families and the broader community in the work of the schools, and they facilitated Instructional Leadership Team (ILT) meetings. Most Fellows were involved in the preparation of their

schools' Whole-School Improvement Plans (WSIP). By the end of the school year, Fellows had chosen and implemented work designed to fulfill their *Scaling Up Instructional Improvement (SUII)* cornerstone. This broad range of school-based work aligned with the SLI cornerstones and with key components of Boston's Whole-School Improvement agenda.

- By and large, Fellows valued what they learned in their classes and could make direct links between a great deal of the courses' content and what they needed to know for their residency work. However, they also raised concerns about a) the links between particular course content and their future work as principals, b) course assignments that took a great deal of time and that they saw as only tangentially related to what they would need as principals, c) the seminar as a forum for Fellows' learning, and d) the value of the portfolio and capstone presentations.
- The program's Executive Director, Coordinator, faculty, and mentors were responsive to Fellows' concerns and, whenever possible, made program accommodations to support their learning.

II.A. The Cohort of Fellows.⁴ In addition to serving as a leadership practice site for the Fellows, the cohort component of the BPF was designed to provide Fellows with a support network during their residency year and in their principalships (or other school leadership positions) after the completion of the BPF program. This support network, the SLI posits, will help to reduce the isolation of the principalship and help Fellows to “learn from one another’s experiences..., problem-solve together, and support one another in learning” (BPF Handbook, 2004). According to the program’s Executive Director, during its first year, the BPF program had not engaged in explicit efforts to build a strong cohort among the Fellows. As a result, during that year, Fellows did not develop a sense of group responsibility and collegiality. In order to create a strong, supportive cohort, therefore, the SLI leadership designed the first week of the summer program to focus explicitly on the development of a cohort, on group development, identity, race, and culture. In addition, they incorporated attention to the cohort into the program throughout the year, for instance, through informal and formal “check-ins” about how the cohort was functioning.

Although the work was emotionally difficult at times, Fellows reported that the program deeply engaged them in developing into a cohort with initial group norms during the first week. They described the BPF faculty who taught during that week as skillful in working with the Fellows on sensitive topics. And, they recognized the importance of dealing with issues of race, class, ethnicity, and gender as part of forging themselves into a genuine group and dealing with school-

⁴We reiterate that with a sample of six Fellows, we are concerned about revealing individual’s identities by citing specific examples. Since maintaining confidentiality is essential, we will omit specific examples that might identify a Fellow or a mentor while trying to convey their meanings.

based issues such as closing the achievement gap. In short order, Fellows reported, they trusted one another and were comfortable turning to one another for help and support in their learning.

I would say three things [forged us into a cohort]. One, there was very purposeful activity that was done, particularly in the summer, that very quickly had us getting into relationships with each other. [Two,] I would also say the mix of who we were. [And, three,] very early on, we recognized that this is a very competitive program. And we could either spend the year competing with each other, or we could spend the year cooperating with each other and supporting each other. But if we wanted to do the latter, we had to be thoughtful about how we were going to accomplish that because just about everything was going to push us into being competitive. And we just never went there. And when we did start sliding there, there was always someone in the group who would sort of call it. And I'm not saying we are all best friends,...but the bond we have around supporting each other, to (a) get through the program, and (b) get a job, is above and beyond those personal friendships that got formed. Fellow B

The emphasis in the beginning of the year in our summer program, on so many physical activities. Having us physically intermixing all together, and then also our other direct conversations about how do we work together as a group and getting to the hard topics right away. So the frank discussions about race, even though that's something that we all talk about the theory and we talk about what to do in our schools. But then as a cohort, how do we deal with issues of race and how do we deal with the history of race that we all grew up with so that we don't start breaking down either on gender lines, race lines or others. Fellow C

The early efforts to forge a cohort were effective. Nonetheless, there were challenges to sustaining cohort cohesion over time. First, two Fellows left the program. Although one Fellow left soon after the start of the program, another left considerably later in the year when she was an integral member of the cohort. This created anxiety for individual Fellows and for the cohort as a group. Second, the work of the Fellowship was difficult, intense, and often stressful.

People took care of each other the whole way through the program. People helped each other get through assignments. When we really needed help getting through assignments, people got help getting through assignments. People shared a lot. It was like, don't let anybody fall out of this. And part of it also might be, after what happened with [one of the Fellows who left mid-year]. It became very clear when [the Fellow] left that we might have fallen short in the cohort....We might not have given him all the help and support he needed. And I think everyone felt pretty strongly that it was unfortunate that we even had to feel that way, and that we didn't want to have that happen with anybody else in the group. So I don't know if part of [us staying as a cohort] was the constant reminder of, "Look, you can fall off. And let's make sure that if people are leaving the program, it's not because we as a cohort aren't giving enough support." Fellow B

And, third, in the end, Fellows were competing with one another for jobs in the district. Members of the cohort spoke of this challenge and the ways in which they addressed it.

I think in general, we try to be very supportive with each other, and are helping people with interview questions. But it's also odd because we are all competing against each other for jobs. It was really hard for some of us when [two Fellows] got jobs and others didn't....But that passed and it wasn't anything that they did or didn't do. It just felt bad.
Fellow E

So that's why I say we're a really tight cohort. Because the whole time we were interviewing for these jobs, we shared questions with each other. We weren't getting the identical questions and we couldn't write them down. When we got out [of the interviews], we would call each other and say, "Here are the kinds of things that I got asked; you should expect to get asked similar questions." Fellow B

We actually haven't had a lot of stress around the fact that some people got jobs and some people didn't. I think in general, we're very supportive of making sure that we all get jobs. So even though two of them have jobs, I think everyone's very happy for them. It's not a very competitive group. Even with the interviews that we all went on, it wasn't as competitive as one might think....It was like, "What were the questions? What came out of the interview with the Superintendent?" Fellow A

As a group, we've dealt with it very well. Individually, it's a different story. Some people are hurt or questioning why they didn't get a job. Which is a natural process. I think a lot of people feel that way. But I think it evolved into us frankly discussing: can we talk about jobs, interviews, everything? Can one person really talk about what it's going to be like for him to do this presentation to his staff tomorrow, when one of us didn't get it? Fellow C

There were other challenges to the cohort that arose from individual differences, preferences, and interaction styles that distinguished cohort members from one another. As in any group, a few Fellows sought more support from the cohort than did others.⁵ And, a few Fellows wanted less from the cohort than did their colleagues. Occasionally, overt reminders of these differences felt like personal rejections and, therefore, reduced the effectiveness of the cohort. As a result, a small number of Fellows suggested that the Program staff check-in with the cohort from time-to-time, identify issues that might be hampering its value and effectiveness, and help the group deal with them. Fellows who raised this concern noted that dealing with the cohort experience would be important for them as cohort members and also as future principals who likely would have to

⁵Key to Numerical Modifiers. In this section of the report, the phrases "a small number" and "a few" describe two individuals. "Several," "some," and "many" denote three to five individuals. The use of "Fellows" or "mentors" alone in the bold text of a finding is equivalent to "all Fellows" or "all mentors." However, within a finding, when "Fellows" and "mentors" appear without a modifier, the number of Fellows or mentors described corresponds to the number indicated in the bold text.

deal with similar issues of group dynamics when they are principals. By mid-year, the program leadership was helping Fellows address concerns that had arisen among cohort members.

Despite the stresses of the program and intermittent interpersonal challenges, by the end of the 2004-2005 school year, Fellows reported that they valued the cohort and intended to make sure they stayed close to their colleagues in the coming years.

I think on some level, there's this friendship that has developed among a number of us. But I think, more importantly, this is a network of other professionals who I trust in terms of knowing where they're coming from, in terms of values, in terms of experience, who I can call and ask for help with problem solving. So I think that's the most important aspect of the cohort, especially as we look forward to the future. And we're trying to be very clear about how we're going to stay in touch beyond this year. Fellow E
The cohort has its strengths, and people are there for each other. We work well together and we're our peers. We work to get the work done, so it's like a working, functioning body, and it functions well. Fellow D

Faculty members who taught in the BPF program the first and second years noted the differences in the cohort's development in the second year and spoke of its benefits.

Certainly there is a difference between this year's and last year's groups. Last year's group had issues that they were working through that were very intense. They had a lot of baggage they were bringing....They were not the unified group you saw this year. They were quite split, they were not always terribly supportive of one another. Instructor A

There's much less conflict that's visible in the rooms during teaching than last year. Last year, a lot of things were charged....[This year] people seem to care about each other; they seem to like each other. They have tolerance for the fact that people have different approaches to learning, and some people will take more time to get to something. All of that is pretty positive. I don't know how to understand the potential competition [for jobs] part. That's a tough thing for a group to support. But I'm pretty confident that they will. There are people in the group that have social and processing skills that help the group address that. Instructor H

Our interviews with the SLI Executive Director made it clear that she and her faculty colleagues had done extensive planning to insure that the first few weeks of the Fellows' experiences were rich in the kinds of content and process domains that would result in the development of strong bonds and a clear sense of how Fellows were to engage in the work of the program. Our data lead us to conclude that the nine Fellows responded well to the initial intensive summer work and, with the help of program faculty and leadership, developed into a cohort of considerable ethnic, racial, experiential, personality, and age diversity. All six of the Fellows in our sample concluded that, despite some challenging moments throughout the year, their cohort membership

mattered, had value for their work in the program, and would be of value professionally for years to come.

II. B. School Residency. The SLI program designed the residency component to provide Fellows with an opportunity to observe “effective school leadership” and with a “theatre” in which to practice the skills of school leadership (BPF Handbook, 2004). This program component includes a year-long relationship between mentor and Fellow and the Fellow’s work within the school.

Fellows reported that they were learning a great deal in their residencies. Although their relationships with their mentors varied, with some Fellows more satisfied than others, by the end of the school year, all Fellows reported that the experience was invaluable in helping them to learn the work required of a Boston principal and to develop many of the skills they would need were they to take on such positions. Mentors, for their part, confirmed that their Fellows had learned a great deal and were prepared to take on positions as principals or assistant principals. Mentors were able to identify areas in which their Fellows, like many beginning principals, would face challenges as they took on their new roles. These areas included, for example, negotiating the BPS bureaucracy, learning to delegate responsibilities, and increasing their knowledge and skill with respect to the district’s instructional initiatives.

Because the Fellow/mentor relationship is central to the BPF’s success, we begin with a brief discussion of the process by which mentors and Fellows were matched. Then, we turn to the work the Fellows undertook during their residencies with particular attention to their *Scaling-Up Instructional Improvement* projects. We conclude the discussion of the Residency with some comments about the feedback mentors provided to Fellows and about efforts to balance work in the residency with course work requirements.

Making the Mentor-Fellow Match. Mentors and Fellows, alike, regarded the “right match” as critical to a successful residency experience. Mentors emphasized the importance of compatibility of personalities, although several emphasized that they could get along with just about anyone as long as the Fellow demonstrated a strong work ethic and a commitment to children. In addition, mentors looked forward to having Fellows who were able to make important contributions to their schools. Fellows, for their part, wanted mentors from whom they could learn, mentors who would spend time with them and enable them to master the multiple facets of a principal’s role. By the end of the school year, most mentors and Fellows had developed strong relationships and a sense of mutual respect for one another even if, at times, their relationships had been challenging during the school year.

Still, most of the Fellows, even those who were satisfied with the matches that the SLI had made, were somewhat frustrated with the process by which they were placed with a mentor. As we noted in our mid-year report, one frustration that many Fellows mentioned involved the ways in which Fellows/prospective Fellows were asked about their preferences for a residency placement. Fellows told us that they had been asked during the BPF admission process to

identify the characteristics of a mentor that would matter to them.⁶ Under such circumstances, Fellows reported that they did not have time to think deeply about an answer to a question that would influence their entire experience in the BPF program. Some Fellows noted that they were not sure about what qualities would matter in a mentor principal since they had no experience on which to draw.

A few Fellows were disappointed by the characteristics of the schools in which they were placed. These Fellows reported that they had wanted schools that had specific kinds of student populations and that represented specific Boston school types. Although they learned a great deal from their mentors and placements, they regretted not having been placed in the kind of setting they had requested. In addition, they reported that no one had fully explained to them the reasons for their placements. Fellow A summarized the sentiments of most Fellows with the following comment.

I think the most critical thing for this program is thinking about where you are and who you're with, and I still think that there should be more thought and more Fellow input into where they're going to be. That basic assignment is made on the assumption that mentor relationships can be formed with anybody, and that is not true. So there should be more of a process in terms of where people go. But, overall it's been a great experience, and I think I'll definitely be a stronger principal because of it. Fellow A

Although Fellows recognized the logistical challenges associated with using a more complex matching approach, several thought they would have liked more information about potential mentors and schools prior to being matched. Moreover, regardless of the matching process itself, Fellows wanted to know why they were matched with a particular mentor.

Many of the mentors, for their part, would have liked to have known more at the outset about the knowledge and skills Fellows were bringing to their schools. In reality, Fellows varied in the extent to which they had taken on leadership roles in their previous jobs and in the extent to which they were knowledgeable about teaching and learning in the BPS. This should not have been surprising given that a few Fellows had no significant, prior teaching experience and others entered the program directly from positions as classroom teachers. Yet, perhaps because they did not have this information or had not considered its implications, a small number of mentors were disappointed by their Fellow's lack of knowledge and skill in particular areas. In making the mentor/Fellow matches, it might have been useful, to the extent possible, to have described the Fellows' areas of expertise to potential mentors. This seems especially important in light of

⁶Several Fellows noted that they were asked about their preferences for a match during a final meeting at which they were offered admission to the program. However, Fellows considered this meeting to be an interview with an interview's attendant pressures and focus on presenting oneself well. A few Fellows mentioned subsequent conversations with SLI leadership about their matches; however, they still felt that they did not have enough information about potential matches in order to make informed comments about what would be the most suitable match.

the SLI's interest in attracting and supporting Fellows who come with a wide range of experiential backgrounds.⁷

Although the process of matching Fellows and mentors was not transparent to either Fellows or mentors, our data reveal that the program's Executive Director had collected relevant information from each of the Fellows, knew the mentors, and considered multiple factors in making recommendations to the Superintendent and Deputy Superintendents about the Fellows' placements. These factors included, for example, a) knowledge about the Fellows' experience with the district's math and/or literacy approaches, b) strengths the Fellow might have in an area such as Family and Community Engagement, and c) the style of leadership the Fellow had been exposed to in previous school settings. With this knowledge in mind, the Executive Director considered a) the leadership styles and strengths of the mentors available, b) the instructional and climate conditions at their schools, and c) how each Fellow would likely develop in and contribute to those schools. Then, the Executive Director, Superintendent, and Deputy Superintendents collectively decided on the final matches. Although the matches may not all have been exactly what the Fellows or mentors had in mind, in the end, as a result of everyone's commitment to the program and to increasing the number of high quality principals available to the BPS, the matches met most of the Fellows' and mentors' needs.

The SLI program has already responded to these concerns by elaborating the process by which mentors and Fellows are matched. Fellows now have the opportunity to talk with several potential mentors, and mentors with potential Fellows before matches are finalized. This revision to the program's design should lead to more satisfaction with the process and the outcome. We look forward to talking with a sample of mentors and Fellows during the next school year to learn about the impact of the new process.

Work in the Residency. The year-long residency is designed as an opportunity for Fellows to work closely with a skillful principal or headmaster in order to develop leadership skills and knowledge in the areas defined by the Dimensions of Principal Leadership and the four cornerstones of the SLI. To this end, mentors involve the Fellows in all aspects of school leadership and management and help them take on specific projects that they can lead.

By mid-year, all of the Fellows in our sample had undertaken meaningful projects and responsibilities in their schools. Fellows were engaged in operational work such as supervising dismissal and in instructional work that included observing and providing feedback to teachers and, at times, participating in formal teacher evaluations. Fellows participated in and co-facilitated Collaborative Coaching and Learning (CCL) cycles. They formulated plans for and

⁷We recognize the difficulty of providing mentors with a detailed "profile" of the Fellows' knowledge and skill. Nonetheless, we recommended in our mid-year memo that it might be useful for the program to consider what it could do to make sure that mentors are reasonably informed about the strengths and gaps in Fellows' knowledge and skill. We now know that the Fellows in the new cohort wrote short essays about themselves to share with potential mentors and arranged interviews with more than one potential mentor. These seem like sensible ways to address the challenges associated with making these matches.

implemented activities designed to engage families and the broader community in the work of the schools, and they facilitated Instructional Leadership Team (ILT) meetings. Most Fellows were involved in the preparation of their schools' Whole-School Improvement Plans (WSIP). This broad range of school-based work aligned with the SLI cornerstones and with key components of Boston's Whole-School Improvement Agenda. By the end of the school year, Fellows had chosen and implemented work designed to fulfill their *Scaling Up Instructional Improvement (SUII)* cornerstone.

Fellows' experiences in developing their school-based work varied in light of their a) mentors' approach to supporting their growth, b) mentors' preferences for having Fellows take on particular projects that the school needed to have implemented, and c) individual learning needs with respect to the cornerstones of the SLI program. The following list details how Fellows and mentors determined the work in which Fellows engaged and the factors that influenced those decisions.

- The Fellows suggested projects or responsibilities based on their own interests and/or needs or a need they perceived in the school;
- Fellows and mentors, sometimes in consultation with the SLI leadership, jointly selected projects, responsibilities, and/or learning opportunities for the Fellow;
- Mentors assigned projects or responsibilities to Fellows in their roles as members of the schools' administrative teams;
- Course work requirements shaped the Fellows' choice of projects. (This was the case, for example, with Fellows' involvement in their schools' family and community engagement initiative during the first part of the school year.)

Mentors' beliefs about how to integrate the Fellow into the school shaped the Fellows' early residency experiences. Some mentors believed that Fellows should shadow them for a period of time before taking on any independent work. Mentors who shared this belief considered it important for Fellows to understand a school's culture prior to beginning specific projects. They for example, wanted Fellows to develop meaningful relationships with teachers before observing them and providing feedback. Other mentors believed that Fellows should have their own projects as soon as possible. Mentors who took this stance toward introducing the Fellow to the school believed it was important for Fellows to demonstrate their strengths immediately, by leading, for example, a data presentation at the beginning of the year. These mentors reported that they saw this approach as a way for Fellows to gain teachers' respect and trust.⁸

So for example, she's really strong in family and community engagement, so I handed her that project, to work with parents and pull that whole thing together, and student support. Those things take time. At the same time, I will see what her strengths are, how

⁸Some mentors explained to Fellows their reasons for how they structured the Fellows' early work in the school year; others did not. It might be useful for the program to consider how transparent mentors are about their approach to working with their Fellows at the beginning of the residency. A bit more insight into their mentors' reasoning might alleviate some of the Fellows' uncertainty about the first few weeks of their experiences.

she works with people. So, I'll be able to give her feedback. And as people see her do that work, it will establish her credibility and she will be able to go into other areas, like going to the classrooms to do observations. And I gave her a few assignments on which teacher she's going to follow the whole year, learning to give feedback and supervision. We didn't do that until the second month so that people knew her a bit. If she had done that right at the beginning, they'd say, "Who is this person? Is this going to violate my union rights?" I wanted to lay that ground work for her. Mentor C

When mentors doubted that their Fellows had valuable skills, they struggled with what to give them to do and reported that they were disappointed in some of their early work.

Mentors wanted to contribute to their Fellows' learning but they also wanted the Fellows' work to contribute to the school and to be sustainable beyond the Fellows' tenure. One mentor, for example, wanted the Fellow to leave behind a free-standing "product" that the school would be able to use again. Another paired a staff member with the Fellow for each project or initiative on which the Fellow worked. This pairing strategy was designed to increase the likelihood that the Fellows' work was sustained beyond the residency by the staff member who would remain at the school. These goals shaped the nature of the projects assigned to the Fellows and helped insure that the Fellow was engaged in "capacity building" in the school.⁹ In the end, most Fellows found themselves participating in multiple aspects of the school's work.

She's participated in everything. She's at all the ILTs (Instructional Leadership Team meetings), and MLTs (Math Leadership Team meetings). She's taken the lead on the WSIP (Whole-School Improvement Plan) with another teacher, and a third teacher on the WSIP team. We're always thinking, not only giving her the experience, but how to sustain the work that's being done, so to target the people that can continue the work. She's aware of that. Mentor F

A small number of Fellows reported that they found it difficult to identify projects that represented real work that needed to be done.

Because there are a lot of people here doing a lot of things, there's not always room to start up a new initiative without taking it out of the hands of somebody else. Fellow E

Most of these Fellows worked in residency sites that were among those identified as "high functioning."¹⁰ In these sites, Fellows reported that nothing struck them as in need of immediate attention and initiatives in which they might have wanted to be involved were already the responsibility of others. At the time of our mid-year data collection, these Fellows worried about interfering with well-functioning school components. They did not yet have the expertise with

⁹We are limiting our descriptions of specific projects in light of the need to preserve Fellow and mentor confidentiality.

¹⁰These were the words used by the program's Executive Director to describe the schools.

which to deepen the work that teachers, for example, or the ILT might be doing. Nonetheless, in consultation with their principals, these Fellows did engage in meaningful work for their schools.¹¹

SLI-required course assignments provided a focus and leverage for some of the work that Fellows did in their schools. They helped Fellows to identify projects and negotiate with their mentors for significant, independent work which they otherwise might not have had. However, on occasion, the course requirements did not mesh well with what the mentor had in mind as a school priority. As this Fellow noted, when the mentor made the difference in priorities clear, it was daunting for the Fellow to proceed.

Another problem, was that this [topic] was such a priority because it was a course work thing. And I had to do this whether or not my school wanted to do it. And so a lot of emphasis on my part of getting this thing done, had become *my* agenda. And so when I said, “Oh, we need to do this,” there was kind of a push-back and the mentor said, “*You* need to do this; we don’t need to do this. We need to think about it. Is this a priority for our school? Is it something that fits in with our work?” Meanwhile, I had a paper due in a month and so I had to get it done. That was a little bit of a challenge. Fellow C

This kind of situation happened rarely, but when it did, Fellows found themselves negotiating with their mentors in order to meet the requirements of the course work as well as the needs and priorities of the schools.

Practicing Leadership in the Residency. Several Fellows reported that they faced a far greater challenge as they strove to take on what they called “real leadership” in their mentors’ schools. These Fellows did not question that they were doing work that was important and needed to be done. Rather, they were troubled by the fact that the work did not match what they thought they should be doing as Fellows who were learning to become principals. The question posed by such Fellows could be stated simply as: When is leadership of a project really principal leadership? When is it contributing to the vision of the school? When is it just leadership of a task that needs to be completed? One Fellow stated the problem in these terms:

I guess the struggle is, is a project real leadership? I came with a very strong ability to lead projects. I was involved in a leadership role in my last position. Now, I feel like I’m back where I was five years ago doing small projects and not necessarily helping to lead the bigger vision. I believe leadership is piecing all those little things together and developing that vision of where you want to go. Projects aren’t leadership to me. Projects are isolated kind of things, and when you’re a principal you have to see this big picture of an organization and think about where it’s going and having ducks in a row and putting everything together. Fellow A

¹¹We will return to the challenges some of this work posed for Fellows when we discuss the SUII projects later in this section.

While we do not have the answer to this Fellow's query, we think she raises a central question about the school-based residency: what is it that Fellows can do and ought to do during their time in a school that benefits them as they learn to be leaders of schools and also benefits the school? When are their projects, designed to fulfill a requirement of the BPF, important learning experiences but not leadership? When are they learning experiences related to leadership? And, what are realistic expectations for Fellows and mentors about what Fellow can "lead" or, indeed, "change?"

I think the program wants us to think that we're going to go into schools for a year and be real leaders in those schools. But it's hard to do that. People don't trust you. People don't know you. You don't know them. You don't know the school. You don't know who to trust. It really takes a long time to get any kind of foothold so that you could make real change....And at our last mentor meeting, somebody talked about the BPF Fellows as being change agents, and one of the mentors said, "They're not change agents, they're here to learn!" And it was really telling that she said that, but it's kind of true. We're not going to go into a school where we're kind of an intern and create change.
Fellow E

Fellows entered the BPF with different levels of leadership experience and different levels of knowledge and skill with respect to the work that must be done in schools that might appear to be a series of tasks. Some Fellows needed to learn about lunchroom and dismissal procedures and experience leading those activities in order to fully understand what they may ask others to do in the future. On the other hand, a good number of principals engage in these tasks themselves in order to stay in close contact with students and parents/guardians. Sometimes an activity is a task and sometimes that same activity is leadership. Having a vision and achieving that vision can, indeed, be accomplished by achieving a series of tasks.

Our consideration of the issues the Fellows raise, leads us to suggest that mentors may not be explicit enough with Fellows about the connections between the daily job of getting the work done and the overall goal of achieving a vision for the school. Mentors may need to become more skillful in overtly linking what they do and what they ask the Fellows to do to their overall vision for their schools and to their conceptions of leadership. Fellows, may need to understand that during the year in which they are Fellows, they need to accomplish some tasks because there is leadership-related learning to be gleaned from them. And, they need their mentors to more fully articulate the ways in those tasks are designed to help the Fellow develop "real" leadership skills. We will return to these ideas in discussing the kinds of feedback Fellows would like from their mentors and in discussing their reactions to the three "leadership" related modules that hold a central place in their course work.

Scaling-Up Instructional Improvement. Fellows were required to design and implement an initiative in their schools that related to the SUII program cornerstone. The "scaling-up" of the cornerstone was interpreted differently by individual Fellows. Some saw the requirement as meaning they would take a small aspect of instructional improvement and try to make sure that it was implemented across the school. Others saw the cornerstone as requiring them to do

something large. When they perceived the work as large, Fellows reported that they could not realistically meet the expectations set for them. Even when the work was of manageable dimensions, Fellows might encounter school-based obstacles to implementation.

The scaling-up initiative is supposed to be a big component of the program. But, the ability to make huge change in your school is pretty limited. So that's been a difficult piece for people, because you're supposed to be making these great changes, but you're not the principal. So you have these projects, but it's just a project. It's a little part of something....If it's something large, it's going to take more time. So there's that tension. Fellow F

We don't have the power that they want us to have to be able to do some of the assignments like the Scaling Up Instructional Improvement initiative. I'm doing a project, but I don't consider a project truly scaling up. I consider it a small little silo thing that's not working in the whole operations of the school, because we [Fellows] don't have that authority or that power to make that kind of change.¹² Fellow A

It's hard, because the SUII was supposed to be "scaling-up instructional improvement." And what I've found this year is that I've done some individual work with teachers to help them improve their instruction. But the [work I planned to do] never played out into this great tool that people could use to improve their instruction, because [of other factors]. And so then, how do I talk about that? That was hard for me, because I think there was this expectation that I'd be really changing instruction, and I really haven't changed instruction....So when I think about the SUII, I kind of laugh because nothing very concrete has come of it, but yet I feel like there's been plenty of learning along the way. Fellow E

Although the program faculty reported that they stressed to Fellows the value of attempting the project and learning from it whether or not they succeeded, a number of the Fellows felt that what they accomplished did not meet their expectations.

I think the project is okay with people. I think for [the faculty], their bigger focus is just, how have we grown as leaders by going through this process, as opposed to really worrying about the actual project and its outcomes. Which I think is both good and bad. I definitely feel that it's good, because it allows me to feel like it won't be really horrible if it doesn't work. Fellow E

On the other hand, virtually all of the Fellows reported that they learned a great deal from this component of their BPF experience.

¹²This Fellow linked the challenges associated with the SUII initiative to the problems she and others had with the organizational courses. The confusion about the purpose and scale of the SUII initiative led some Fellows to report that the assignments in this course are not tightly tied to the residency work. We will return to this issue in discussing the links between courses and the work in the residency.

Well, the good thing about choosing that as my scaling up initiative in the WSIP work is that it's work that would really be done in any given year, and that does outline the instructional changes that you want to make in the school. The bad part is that some of the changes aren't going to be easily seen in a short period of time. I would say it requires more of a long-term perspective, perhaps a strategic plan for three years. Fellow F

I think one of the [valuable] things for me was the fact that I was able to dig deep into teaching and learning. I had done a lot more administrative work. And I was always doing work around teaching and learning, but it was on a very broad scale. And so there was sort of the breath-versus-depth. This [SUII initiative] was my chance to really look in depth at something, and be able to feel very confident and know a lot about it. And it's something that I think all of us in Boston are struggling with. It's an issue that not any school has truly mastered. So this was a good place for me to kind of think and to focus. Fellow A

Although more than half of the Fellows in our sample were dissatisfied with the development and completion of their SUII initiatives, they all agreed that they learned important lessons from having undertaken them.

From the perspective of the BPF leaders, the purpose for assuming responsibility for a SUII initiative is to insure that Fellows participate in all steps of the school improvement cycle: 1) collecting and analyzing student performance and teacher observation data, 2) identifying priorities for instructional improvement, 3) developing and implementing a professional development plan to address the priorities, 4) observing in classrooms to assess the implementation of the learning from professional development, and 5) returning to analyze, once again, student performance data to assess the impact of professional development on teacher practice. By participating in this process, according to the BPF Executive Director, Fellows learn how to manage change and improvement efforts in the context of using what they are learning about school leadership, school culture and organizational analysis.

Although the goals of the SUII are clear, the BPF Executive Director noted that the extent to which they were achieved varied as a result of school context, mentors' preferences for the kind of improvement work they wanted their Fellows to assume, and factors related to the Fellows' level of understanding about the parameters of the SUII. While all Fellows assumed responsibility for a significant project within their schools, not all SUII projects were tightly connected to the phases of the improvement cycle and to the core instructional improvement work of their schools.

Given the purpose of the SUII as an important learning experience, and given these findings, we suggest that it might benefit the overall value of this program component to have the program leaders and the faculty become even more explicit with Fellows and mentors about the purpose

of the SUII project, its expected dimensions, and what constitutes realistic standards of accomplishment and learning.

Fellow-Mentor Relationships: Keeping the Conversation Going. For all Fellows, a significant part of their relationship with their mentors involved receiving feedback on the quality of their work in the schools. Fellows reported that they had anticipated creating a regular time, perhaps weekly, when they and their mentors would sit together, review the Fellows' work, and plan for the next steps. Indeed, the document called "Mentoring Expectations" recommends that mentors, "Check-in with the Fellow daily and schedule regular opportunities to debrief, including a monthly discussion of the BPF theme." In practice, our data lead us to conclude that none of the Fellows and mentors set up regular feedback meetings. Nonetheless, Fellows reported that they spent considerable time with their mentors and learned from them.¹³

Both Fellows and mentors reported that, most of the time, they met daily. These meetings were ad-hoc in nature, addressing Fellows' questions and Fellows' and mentors' current work in the school. Fellows reported that, ideally, they would prefer more structured meetings in which they and their mentors could check in and discuss the progress of their learning relative to the expectations of the program. However, they appreciated the time their mentors gave them and adapted to their mentors' style of meeting. Mentors reported that they were easily available to their Fellows, and several described having open-door policies toward them and other members of their administrative teams. Many Fellows met with their mentors on a regular basis, as well, due to their participation in administrative team meetings.

When their work was going well, this arrangement seemed satisfactory. However, as one mentor pointed out, without regularly scheduled meetings focused on the Fellow's progress, there was no forum in which to address important, broad, and challenging issues that might arise as Fellows prepared for the principalship. Ad hoc meetings tended to keep the focus on immediate, sharply-focused, activity/project work.

Despite frequent interactions with their mentors, more than half of the Fellows in our sample wondered about "how they were doing" in the residency. These Fellows reported not receiving much evaluative feedback from their mentors.

We've been talking probably once or twice a week, and it's certainly almost never about my performance. It's almost always about stuff that's going on in the building.... She'll ask me what I think, which is probably useful somehow, but there are times when I want to say, "Look, am I doing a good job here or not? I don't know." I've tried to ask her, and it just doesn't ever go where I think I want it to go. I've kind of given up on that. Fellow E

¹³In discussing the links between the course work and the residency, we will return to this issue to discuss the value of such mentor/Fellow meetings for making more explicit the links between these two BPF components.

I would like more feedback about how I am doing here, and that is supposed to be the role of the mentor. I guess that could be done more....I'm not sure what exactly that would look like, but I feel like that's a missing link. . . . And I know [my mentor] has opinions, but she doesn't necessarily tell me. She hasn't said anything bad [about me]....We talk a lot; we'll talk a lot about things I see or debrief things. She is great with giving me time and access, that's wonderful. I just can't say enough about how great she's been around that. But, I can't say that I get a lot of feedback. Fellow A

Fellows also noted that the absence of formal, regular mentor/Fellow meetings meant that mentors were not always aware of what the Fellows were doing in their courses and how that might link to work in the residency.

We haven't found a good way to communicate and so there isn't, probably, enough carryover of what I'm doing in class and relating it to the school here. Fellow F

Mentors reported that they believed they were giving adequate time to their Fellows. Most noted that working with Fellows was time-consuming for them, especially when Fellows needed considerable support in specific areas of the competencies. In part, they reported, this was because the BPF program was "more intense" than other principal preparation programs in which they had been involved. Among those mentors who cited the program's intensity, however, most also noted that their Fellows were contributing to the school in meaningful ways as a result of the program's intensity and demands. Still, they agreed that they found it difficult to set up scheduled times to meet with the Fellows and, in general, seemed resistant to the idea given the pace of their days and their work habits.

The program's Executive Director reported that she focuses mentors' attention on providing more explicit feedback to the Fellows when she visits the schools and sits down with mentors and Fellows for formal, three-way conversations. The mentor pair training sessions provide another formal opportunity for such conversations.

To be honest, I think the big picture of "how's it going," [those conversations] happen when I make them happen, because I show up to have them happen. [Although] I think some mentor pairs do it regularly. They also happen when we have mentor pair training meetings. These are moments that are explicitly defined in the curriculum and the program for the purpose. Rachel Curtis

There are mentors, according to the Executive Director, who are more intentional about having such conversations on a regular basis. And, she has concluded that all of the mentors do consider what the Fellow a) has learned to do well and, as a result, do not need to continue at the same level of intensity, and b) has yet to master and, therefore, needs to address further. However, in order to encourage more of these kinds of conversations, the SLI provided mentors with the Dimensions of Principal Leadership rubric which they could use to track and discuss their Fellows' progress. Two mentors indicated that they were using this rubric to differing

degrees and another reported finding it awkward to use such a formal evaluation tool to give on-going, formative feedback¹⁴

Given the very high stakes attached to doing well in their residency work, their regard for their mentors, as well as their desire to learn as much as possible, and link their course work to the residency, it is not surprising that Fellows desire such feedback. In the service of focusing Fellows' learning as well as of assessing their progress, it is reasonable that mentors should provide it. We return to this issue in the conclusions.

Balancing Time for the Residency and Course Work. Finally, most Fellows spoke about the challenges and tensions they experienced with respect to their residency work when they had to leave school to attend courses. More specifically, Fellows reported that being out of school two days in some weeks in order to attend Thursday course sessions, in particular, was stressful and interrupted the flow of their work. Fellows who worked in "late start" schools missed additional school time since they had to leave school early to attend Tuesday seminars.

These absences from school led Fellows to miss important SSC (School Site Council), ILT, and/or team/grade-level meetings, some of which were related to their specific project work. They reported that it was difficult for them, at times, to make authentic and significant contributions to the school when they were not able to follow through on initiatives on the days they were off-site. Some mentors echoed the Fellows' concerns about the number of days they were required to be out of their schools. Given these mentors' concerns, Fellows wondered whether their mentors had been fully informed about the actual time the Fellows would be in the school and in coursework. Fellows themselves had thought they would have four full days each week in their schools.

I don't think the principals had a good understanding about, first of all, what our role is, what other responsibilities we have as far as class work, how that really pans out. I don't think [the program leaders] communicated enough with the principals about the demands that were placed on us outside of our school....I think the biggest problem is the principal expecting us to be there Monday through Thursday, and then us only being there Monday through Wednesdays and some Thursdays....You start things, but you can never follow up. Fellow F

One of the mentor principals talked about the ways in which the Fellow's schedule influenced the Fellow's work.

Because she is pulled out, I don't rely on her for a lot of things. She has a couple of operational things because I know that's important, but she can pick up a lot of that by walking around the school with me....But, when they're pulled out in the areas you're trying to grow them in, there's no consistency [in their learning]. [The Fellow] has

¹⁴The SLI Executive Director knew that most mentors were not using the rubric for on-going evaluation.

missed two ILT meetings, and that's crucial, because she was really making strides there, and that's the place where I integrate her into the school. And the next one coming up, she's not going to be able to make, and that's unfortunate because that one's focused on the WSIP. She's missed two dynamic school site council meetings after she actually facilitated and spearheaded their work and did the surveys and got the parents and helped them to shape the action plan. Mentor A

Fellows must attend to their course work as well as their residency and there is never going to be a way in which the program can avoid having them leave their school in order to participate in their courses. There may be ways, however, of decreasing the disruptions to the school and to the Fellows caused by this past year's schedule. We wonder whether it would be possible for seminars to begin later for at least half of the school year in light of the particular disruption they pose for Fellows who work in late-start schools. We wonder whether it would ever be possible for a school to change its ILT and/or SSC meeting days for some part of the school year in light of the Fellows' work on these teams. If, mentors were more fully cognizant of the exact demands the SLI places on Fellows and their implications for time in the residency, it might be possible for mentors to make adaptations that would benefit the value the mentor has to the school as well as the value that the school has for the mentor.¹⁵

Finally, although being away from the school was challenging to many of the Fellows and mentors, it seems to have posed special burdens for the Fellows and mentors during the first two weeks of school when Fellows were trying to become acclimated to their schools and develop a presence among the other staff members. A few Fellows mentioned that it was particularly difficult to miss two days during a week so early in the year. If being out of school for course work does seem to complicate the Fellows' early days in the residency, perhaps the SLI leadership could modify the course work schedule for a week or two to maximize Fellows' time in school at the beginning of the residency.

II.C. Course Work, Seminars, and Assignments. The BPF, as designed, prepares Fellows to be certified as principals in the state of Massachusetts and it enables students to obtain an advanced degree from the University of Massachusetts, Boston. As such, the program must meet the state and university requirements for certification and degrees. These include the requirement that students satisfactorily complete a series of courses. The BPF course requirements, therefore, were designed to meet the state and university requirements as well as to prepare Fellows to be successful in the BPS given the district's Essentials of Whole-School Improvement.

Without question, course work in the SLI is essential to the development of Fellows as thoughtful, knowledgeable school leaders. They cannot possibly learn all that they need to know to begin their careers as principals solely by working in schools. Therefore, the courses,

¹⁵In raising these possibilities, we know that making such changes may create hardships, may even be impossible for teachers and others who serve on these teams. We offer the ideas in the spirit of starting a conversation about ways in which school and SLI needs might be more symbiotic in the coming years.

modules, and seminar which were taught during the summer and the school year, provided the Fellows with knowledge and skill in a wide range of areas which included among others, a) leading Boston's literacy and mathematics initiatives, b) family and community engagement, c) using data to improve instruction, d) special education and sheltered English immersion program, e) teacher supervision and evaluation, and f) leadership, organizational analysis, and organizational change. These and other courses were designed to help Fellows learn important content and connect it to their work in the residency. To this end, where possible, assignments were crafted to make the connections between course work and residency work explicit. The Portfolio and Capstone assignments were designed with the expectation that they would enable Fellows to synthesize significant learning from their year of study in courses and in the school.

Despite the best of intentions and keen attention to program design, Fellows frequently felt torn, frustrated, and sometimes angry about the joint demands of their residency and their course work. This was true even when they found the courses to be of great value.

The SLI Executive Director was acutely aware of the tensions and the competing "pulls" on the Fellows, but was also quite clear that both program components were essential to the development of high quality principals for the BPS.

I think they're both essential. I think the residency, by dint of its constant presence and demands, is more important to them. I work really hard, and sometimes in a way that makes me less popular, to make sure they're always thinking about the course work. Because what happens, and what I'm very aware of, is that just like everything in the schools, there's such an immediate demand in the schools: we've got to do this; we've got to do this; we've got to do this. There's a culture in the structure of schools that doesn't encourage reflection. And, it's very easy for a Fellow to get sucked into a school and think everything that's going on in that school is the most important thing that's going on, [to think] that they can't come to class because school is more important. So, [for me], it's this constant act of reminding them, "This is the one year, the only year I can imagine that you will have the opportunity to have that kind of intense experience in school and also step back from it to reflect [through your courses]." Rachel Curtis

As we described in the previous section, mentors, too, felt that course work demands, at times, were detrimental to, or at least competing with, the work Fellows needed to do at their schools.

Over the school year, Education Matters observed five class sessions from five different courses and two seminar sessions. The classes we observed were from: Preparing for Entry Into the Residency Module; Leading Boston's Math Initiative; Data Curriculum; Teacher Supervision and Evaluation, and Organizational Change. During interviews, we asked Fellows to talk about their courses and the links they were making between the course content and assignments and their work in the residency. We also interviewed five faculty members who were teaching these courses.

By and large, Fellows valued what they learned in their classes and could make direct links between a great deal of the courses' content and what they needed to know for their residency work. They were clear about the kind of pedagogy and internal course organization that helped them learn, although Fellows did not always value the same kinds of organization and pedagogy. However, they also raised concerns about a) the links between particular course content and their future work as principals, b) course assignments that took a great deal of time and that they saw as only tangentially related to what they would need as principals, c) the seminar as a forum for Fellows' learning, and d) the value of the portfolio and capstone presentations. We begin with a consideration of our findings on the scheduling of courses across the school year. Then we turn to issues of pedagogy and Fellow learning after which we consider the issues Fellows raised about the seminar, course assignments and, the portfolio and capstone presentations.

Scheduling of Courses. Courses varied in the way in which they were scheduled across the year. A few were begun and completed during a short span of time; others were spread across the school year. Fellows identified benefits and shortcomings in both organizations.

In general, it's nice to have a course that's consistently laid out rather than a month here, and you take another course and two months later you see the person. But the three days in a row is kind of a lot, it's just so much information and a bunch of work to do. You sit there, and then you're done. I'm not crazy about the three day format. [For example], the budget class was good, because you got to try out how the budget affected different things. But the drawback was it was those three days in a row, and so we didn't have that much interaction with the professor after that. You didn't have any interaction; it was just a one shot deal. Fellow F

This semester it's a lot more difficult, I don't know why, but this semester courses are spaced out a lot further from each other, so I tend to lose sight over where I'm going, and there's the [problem of the] continuity of classes. I guess I like when they're a little bit closer together, or if they were linked in some way. I feel like right now we do a class and then we don't have it for awhile and then we do a class. Fellow A

For me personally, it's easier to have all the course work flowing right next to each other. I mean, it's just easier to stay focused on it. And it's hard when one week you are doing one course and the next week you're doing a different course, particularly around the assignments. It was hard to stay focused and build on what you last did. Fellow B

The faculty members with whom we spoke recognized the challenges posed by the different time spans in which they taught their courses. Like the students, they could see advantages to teaching in a short block of time and also in spreading their courses over more elapsed time. Some faculty members who taught the most closely-spaced courses would have liked the opportunity to come back together with the Fellows at another time during the year to insure that they were making connections between the course content and their residencies and, in the case of courses in which some Fellows had difficulty with the material, to review and re-teach as needed. For example, a faculty member who taught the course that focused on mathematics would have liked

to review the course content and focus after Fellows had experience working with math teachers in their schools. And, she suggests that there would be value in making links with other course.

I think it could be more powerful if we had worked with the group more than once. Maybe three times throughout the year. Maybe at the beginning of the year we could just focus on the coaching around mathematics [content], and then wait and meet with them maybe more towards the middle of the year after they've had some experiences. They also have a separate evaluation course. And so if we were able to have them another three days towards the middle of the year, we could then begin to make even stronger connections to the other courses that they have and talk about that evaluation piece.
Instructor E

Other faculty members stressed that, even if the overall scheduling could not change, it would be important to minimize the disconnect between closely-spaced courses and courses that were taught over extended periods of time. This could be accomplished by enabling faculty to make connections between their course and others in which the Fellows were/would be involved. In order to do this, of course, faculty members would need to be knowledgeable about their colleagues' courses. One faculty member noted that this possibility was being developed in at least some of the courses.

I feel like my courses, at this point, are pretty discreet from the other courses. So that is one of the things I am looking to change a little bit. [Next year] we are going to deliver these courses a little bit differently. It's not about a different amount of time. In fact it will be a little bit more time probably. But there is some thought to trying to link them by having fewer different instructors. I do not think that there is necessarily a goal of integrating all of the courses but of making the faculty less sort of spread out and then having faculty meetings where we share each other's work [plans] in the beginning of the year. Instructor F

Fewer individuals teaching more of the courses could provide a mechanism for internal integration and, certainly, some meaningful connections could be drawn by having faculty members become more aware of each others' content and the ways in which they could make connections. Other planned connections will happen as a result of course re-design.

Next year I am going to be teaching another class in SLI with Instructor G. She does the math course and we are redesigning a bit how the literacy, math, and courses about high quality instruction and leading high quality instruction look. So Instructor G and I are going to teach all of those. We are going to teach a class on what good instruction looks like, embedding literacy in math, connecting them as opposed to how it has been sort of separated out like we do instruction and then we do a few days of literacy and then we do a few days of math, and we assume people are making connections between their district's chosen models workshop, TERC, etc. and like what good teaching and learning looks like. And we are finding that connection is not obvious. So Instructor G and I are working right now on redesigning that and then the spring component of it is going to be

how do you lead effective instruction which is going to focus on professional development. Instructor F

Other faculty members pointed out that some of the challenges to providing coherence in courses that were spread over time came from their particular location in the school calendar. As one faculty member commented:

I liked the interval between the January class and the February class, but this spread between March and April is probably too big. But partly it's too big because they're now transitioning to other parts of their lives, they're now getting principalships and the demands on them are now even greater. Their schools are going through MCAS; there are a lot of real-world demands on them. Instructor A

Given the length of the program and the amount of knowledge that Fellows need to learn, there will always be challenges around scheduling course work so that it is meaningfully placed in the Fellows' calendars and taught over a time span that allows the Fellows to learn and make use of the material while they are learning it. It will always be difficult to know just when a Fellow could make the most use of some content in light of her particular school-based work. The SLI can only make its best estimate on when and how to schedule course work in light of the programs' and Fellows' needs. Our conclusion, based on what we know about learning in intensive programs is that the proposed changes will benefit Fellows. They will not, however, solve all of the challenges posed by a one-year program.

This is because complex material should be taught, learned, and practiced over time and in multiple contexts for maximal learning. Fellows can become familiar with the district's math program at one point in time but later, when they are working with math teachers, they would likely benefit from a formal opportunity to revisit the contents of the math course to review and ask questions that arise out of their school-based work. This would be difficult to arrange in any program, let alone one in which the Fellows and faculty do not have the luxury of time.

The program leader and the faculty have already begun to think about the ways in which they can minimize the disconnects among the courses and maximize the links among them. The suggestions that faculty members offered – reducing the number of different faculty members teaching courses and providing faculty members with the information they need to make connections between their courses – were being put in place at the start of the 2005-2006 program year. Stressing to mentors the need to stay aware of the content of the Fellows' course work so that they can link it to their work in school would be another way to increase Fellows' opportunities to make better use of what they are learning.

Pedagogy. Fellows reported that faculty members varied in their approaches to instruction, and their pedagogy influenced the extent to which the Fellows found the courses engaging and productive. The courses that Fellows found most engaging were described as well-planned and involved them in a variety of learning activities. Less engaging courses, according to the Fellows, required them to spend too much time sitting and listening or talking in

a large group. We present examples of Fellows' positive comments about what made their courses exciting learning opportunities.

I think Instructor A is extremely organized. She comes in with a very solid lesson plan. It's a day that's flowing, that's full of learning. It's very structured, so we're doing lots of things throughout the day, so it doesn't get boring. She's a very good teacher, which I think makes a huge, huge difference in the learning, and I like the feedback. And, Instructor B was great; she was so structured. She really thought about how to break up the day, how to really focus on lots of different learning styles. She had this clear agenda that you're going to do for the day, she has a rubric that you have to grade yourself on the day, there's lots of movement, lots of discussion. She's very similar, actually, to Instructor A. She'll go up on the overhead, then she'll do small groups, then she'll do partner work, the day flows, because there's constantly movement and constant things going on. Fellow A

Instructor A just very organized and very thoughtful about how she plans things, so she'll start off a class sort of reviewing and talking about what happened in the last class, and then she'll go over the agenda. She uses the first ten minutes of time really well. She was very conscious about the ten minutes where you're giving people information, and they're given two minutes to kind of make it their own, digest it. We were having a discussion – she then stopped and said, OK, turn to your partner, summarize what you heard so far. She just had a lot of different summarizers and activities and tricks for keeping things going. Fellow E

Instructors C and D were well prepared. Their techniques were powerful. They're powerful facilitators. They knew exactly what to do. They caused us to participate in activities that gave you an a-ha moment. Fellow D

Instructor E was good. There were lots of interactive pieces, different groupings, practical applications. And, the data course was pretty good because you actually did real things. Fellow F

If I had to say there was one person, Instructor A's class stood out in my learning as the most critical class I took, and the person who influenced my thinking the most. It was her. Her classes are phenomenal, because everything you hear about good instruction, she does. So you actually see what a difference it makes as a student to have a really good instructor. Fellow B

Instructor F, definitely. I think part of it is her personality, she's very easygoing, she helps, in terms of the learning, I think that's helpful. She's also very open to feedback, very low-stress. She doesn't put the pressure on you; it's the climate of the classroom that she creates. It's the same thing as with students: you perform better in a class where the professor likes you and treats you with respect and genuinely cares about what you're

learning and whether it works for you and is very open to giving you ideas and supporting you. Fellow A

I really liked the actual sort of pedagogy in classes – Instructor H had us do a number of activities that were really interesting, and sometimes she’ll ask us to help her think about, “How can I teach this so that you’re not just sitting for the next 20 minutes, listening to me lecture?” Fellow E

In contrast, Fellows reported that they were less engaged and learned less in courses where they spent too much time sitting and listening. With respect to one course in particular, several Fellows reported that pedagogy and the instructor’s approach to the content especially compromised Fellows’ learning of a topic they thought was of high importance to their development as school leaders. Fellows’ concerns about this course stemmed from the instructor’s choice of activities and examples, and from what they perceived to be her lack of passion for the content.

Fellows reported that instructors tried to develop assignments that connected the formal course work with the residency and that, in many cases, they were successful. Furthermore, some course content was obviously applicable to the residency site even beyond assignments. For example, Fellows could see the need for what they were learning in the literacy and math classes as well in the supervision and evaluation course. They could link what they were learning about data analysis and use to the challenge of using data to improve instruction. The family and community engagement course was useful to them as they developed their related projects at their schools.

While Fellows generally identified strong links between course content, course assignments, and their school-based work, most Fellows wondered why they had to write formal papers in order to demonstrate their learning. Indeed, they wondered what they were demonstrating through their written work. Specifically, Fellows objected to the number of papers they were required to write for three reasons: 1) they were not useful to them as learning activities; 2) they were not helping them to learn the kind of writing they would do when they became principals; and, 3) they took too much time to produce in light of #1 and #2. While Fellows thought that writing “academic” papers would make sense in a traditional, university-based principal preparation program, they thought that they were out of place in the SLI’s alternative program. At the same time, Fellows recognized that they were completing required university courses that would count toward advanced degrees and or certification.

The program’s Executive Director, Program Coordinator, and faculty were all aware of the Fellows’ desire to complete assignments they thought would be better tied to the work they would do as principals and, by mid-year, some assignments for the second half of the school year were changed or made more flexible to respond to Fellows’ concerns.

We have made some suggestions that instead of having us write papers, especially like reflections, why don’t you have us write memos? Because that’s what we’re going to do

as headmasters, we're going to write one- or two-page memos to people to communicate issues. Or we're going to set up agendas for meetings, or we're going to do PowerPoint presentations. We're not going to write reflective pieces, or five-page papers or ten-page papers as part of our practice. So Rachel Curtis had us write a memo for one of the assignments. And she had us also develop sort of a tool along with that, which was a one-page outline of "what would good PD look like?" And that for me was a very useful, reasonable assignment and I could get it done. Fellow B

Other faculty members identified what they wanted Fellows to be able to master as key learning from their courses and suggested that Fellows identify ways in which they could demonstrate that learning that would better link to their applied work. Fellows appreciated the fact that program faculty and leaders responded to their concerns.

Our data collection strategy did not enable us to pay close attention to the assignments that Fellows were asked to complete and, as a result, we have no independent view on the value of the written papers that had been assigned or on the value of the memos or other products that replaced them. However, we think it remains important, whatever the format of the assignments, that they require students to reflect on and deepen their understanding of what they are learning and its applications to their work as school leaders. We caution the program against creating too many assignments that seem "useful" to Fellows in light of their future roles, but which may lack the demand for rigorous thinking that Fellows ought to be doing as part of their year of learning. Developing assignments that require rigorous thinking and are also relevant will likely be a challenge. Perhaps the faculty as a group, while considering the links among their courses, could spend time developing assignments that span the content of multiple courses, where sensible, and include these other characteristics, as well.

The Portfolio and Capstone Presentation. In light of this discussion of assignments and their link to the residency, we turn to a brief consideration of Fellows' views of the Portfolio and Capstone Presentation assignments. According to the BPF Handbook, the purpose of the Portfolio is as follows:

To document their work in the residency, and its connection to the program cornerstones and capstone, each fellow compiles a portfolio. Organized by cornerstone, and capstone, the portfolio provides fellows the opportunity to share their work in the residency, over the course of the year, and reflect on it in the context of the program curriculum.

The Leadership and Learning Capstone Presentation, the final culminating project of the fellowship is:

a public presentation by each fellow that documents the learning over the course of the year and articulates the fellows' theory of school leadership, which will guide him/her in the principalship. This presentation is a comprehensive assessment of the fellowship and is a requirement of graduation. Reflecting on

leadership and learning from course work, the residency, school visits, and work with central office staff, each fellow identifies the experiences that have had the greatest impact on his/her learning and leadership development. The fellow then articulates his/her theory of leadership and describes how BPF experiences have shaped it. Finally, the fellow looks forward to his/her assuming leadership of a school, and describes the key elements of his/her first year of school leadership.

Most of the Fellows in our sample took issue with having to complete both of these assignments because they saw them as redundant. In addition, they were not pleased with spending time on a final product that, they felt, would not be useful to them as they moved into leadership positions. Although a few Fellows agreed that the thinking they did in order to produce these products helped them synthesize what they learned, others doubted that these assignments had this impact.

Do you need to have a portfolio and a capstone? They seem to be doing the same thing. I think it is totally useful to have to say what my growth has been for the year. And I also think this whole idea of an emerging theory of leadership is useful, and having to vocalize how I will use it is also useful because it makes it more likely that I will use it. But the Portfolio and Capstone feel contrived. Still, when push comes to shove, it was useful to have to vocalize [what I learned]. Fellow E

I'm not sure why we had to do a portfolio and a capstone. Both were an effort to get us to synthesize our learning. It was a lot of work to do both. Certainly, doing the portfolio put me ahead of doing the capstone. But had I only had to do one or the other, I would have had a lot less work. And do I think I would have lost out on some learning because of that? No. Would I say that pulling together the portfolio helped me be clearer about what the work is that lies ahead? I would say, "No." Did it help clarify for me anything about the work I had done already? I would say, "No." So were there these big "aha!" moments, pulling it together? I would say, "No." . . . You know the way we ended up doing it, it's not even something you would take to a job interview with you. Fellow B

I think the intentional purpose was to help you synthesize the learning, review the year, and to help prepare you for your capstone. And to demonstrate your learning or your growth over the year, that was the intent. . . . I feel like it was more paperwork. Fellow F

From the perspective of the SLI's Executive Director, both the portfolio and capstone presentation were valuable synthesis activities that were appropriate as end-of-the-year products. In fact, Fellows agreed that there was value in synthesizing what they had learned. However, Fellows found the process of preparing these products redundant and, for those who knew they were going to be principals, too focused on the past year rather than on the year ahead which was now prominent in their thinking.

These findings suggest that it could be useful for the SLI leadership and faculty to review the purpose and design of these final products and consider the extent to which the work that Fellows produced in response a) reflected the kind of learning the program desired from the

assignments, and b) met the needs of Fellows who were about to assume leadership positions. It is possible that such a review would lead to the conclusion that both products are valuable and should be kept. If this is the case, it might then be useful for the program leader and faculty to explain clearly to the Fellows why these assignments are valuable. On the other hand, such a discussion among the faculty might reveal shortcomings in the assignments that lead to a revision process.

It would also be worth considering whether some objection to these assignments arose over the fact that they are (understandably) due at the end of the school year when Fellows were in the thick of end-of-the-year activities at their schools and the stress of searching for jobs. While culminating activities need to come at the culmination of the program, it may be that these assignments require too much work at the end of the residency year. We do not know the answer to this question, but think it is worth considering. In addition, it might be worth considering whether these products were the best ones for those Fellows who had been appointed to the principalship mid-year. Given the ways in which they had spent the last several months, these assignments might not have been helpful to them.

Finally, it would be useful to talk to this year's Fellows again next year in order to learn what they think of the portfolio and capstone in light of the work they are doing in schools. It may be that the products have more value viewed from a distance. Or, it might be that the Fellows will have good insight into the kind of final products that would have helped them in light of the leadership work in which they are engaged.¹⁶

We turn, now, to a discussion of the leadership modules and then the seminar. We have chosen to give them special attention because a) both were core components of the BPF program, b) both lasted the duration of the Fellows' residency year, and c) Fellows raised concerns about each that are distinct from what they reported about their other course work.

The Leadership Modules. The BPF program is designed to prepare highly qualified principals for the BPS. Toward that end, as we have discussed, the program engages Fellows in a cohort experience, in a year-long school residency, and in a series of courses. The leadership modules, unlike the courses we discussed earlier, are spread over the twelve-months of the program. The Summer Leadership Module, according to its instructor, Lee Teitel,¹⁷

Focuses on “who you are as a leader,” as well as on issues of communication, that is, how people talk to one another....It's about dealing with conflict and how you talk to each other about tough stuff. It's also pretty closely embedded with the curriculum course, which is about, basically about, how do leaders shape cultures in schools that lead

¹⁶We will ask about these products as part of our Year II evaluation.

¹⁷When possible, we have not named individuals in this report. It is not possible, however, to write about these modules without identifying the faculty member who taught them. Therefore, with his permission, we name him here.

to high achievement for kids?...So a lot of the module is kind of personal, personal skill development, personal goals, personal values, how you can be effective in doing this work. We end the summer module by saying, “OK, you’re now about to go in to a school; you’re going to be going to this whole other environment,” so we introduce some Bolman and Deal [framework] material.¹⁸ [We tell them] it’s really a way to do some initial organizing of the data that’s going to be coming at you [at the school].

The Bolman and Deal frames referred to above, were provided to Fellows as a set of lenses with which they could analyze the organizational settings in which they were placed. The lenses were a way to help Fellows orient their focus on instruction, school culture, and overall school structure from the different analytic perspectives. The modules were designed to help Fellows make connections to leadership with respect to the instructional ideas they encountered through the work of Theresa Perry and in Laura Cooper’s module. These ideas elaborated what worked for developing high achievement for African American and Latino students.

The second module, Organizational Analysis, is designed to help students analyze a school organization – not their residency site – using the four frames. The goal of this activity is to have the students understand the frames in action and to see what they can learn from using the set of ideas to “look at a situation.” (Teitel) The notion is that the frames will be useful to Fellows in analyzing their own schools and in doing walk-throughs of others.

The third module, Organizational Change, is designed to support students as they engage in their Scaling Up Instructional Improvement work.

The last major course component is taking leadership around one of the WSIP challenges. And that’s the part that some people were clearly moving on it and in some places Fellows had a variety of difficulties in engaging in that....In theory, the idea would be that by late fall, Fellows are taking substantial leadership on some area of change in the school, and are moving from analysis to action. The course in the spring, when we meet for the four times, focuses on: how do we support each other in this work [as a cohort]? How do you learn from the frameworks to think about this work?

The assignments for this class – mostly papers – were designed to connect the frameworks and other analytic tools to the work the Fellows were doing in their residency sites.

The assignments reflect my push to analyze, apply, and reflect. Basically, every paper had a little section about “tell me what happened while you were doing this” by using some of the ideas we’ve been working with in the course to analyze it. Then, students were asked to reflect on how this work and analysis was helping them develop a sense of leadership. Lee Teitel

¹⁸Bolman, Lee, G. and Deal, Terrence E. (1991) *Reframing Organizations: Artistry, Choice, and Leadership*. Jossey-Bass

Students reported that they did not find writing the papers useful to them either in trying to lead the instructional change work at their residency site or in developing their ideas about their own leadership. After they made their sentiments clear, professor Teitel changed the design of the required projects by telling students, fundamentally, “here’s the goal, here are the three things I want you to be able to do, [analyze, apply, and reflect] and I’m very open to how you do it.” Students appreciated the changes.

This set of modules focused on the role that Fellows seek: the principalship. The description of the modules suggest that they are designed to be aligned with the work these leaders are doing in their residency sites and will be doing in years to come. Two of the six Fellows in our sample found the modules to be essential to their learning and work.

I think it’s very relevant. The work for Lee’s course has been: look at your residency site, use these different tools to analyze it – and that’s valuable. It gives us practice at something that we may be doing in the fall. And there was one particular activity we did the last time we met where we developed our own vision alongside the reading and created some sort of flowchart or a symbolic picture on the wall that explained it. I liked the sort of visual aspect of that. Fellow E

This course is like a capstone of all our other course work. The complexity of our discussion is so rich in that we have a text-based discussion and we’ll anchor it in evidence in the text, but then it will be tied to eight other courses that we’ve taken together. And it’s so substantial, because we all talk about our work, in the residency, all in the same district, all with the same mandate. So I think that this [course] is really integrating the work. Fellow C

Yet, four of the Fellows in our sample took issue with the modules, claiming for different reasons that they were not relevant to their learning. The first Fellow quoted below considered the knowledge provided in the modules to be theory that could not be tied to practice until she became a principal. The modules’ class work, discussions, and assignments, in other words, did not lead her to see that there were ways to practice using the frameworks – the theory – in the context of the residency.

It’s very necessary, there’s very important information, it’s just harder to link to what we’re doing now, and I think the information, talking about change and talking about organizational analysis, is very helpful, and there are pieces of it that are great. I just don’t think it’s as linked to the practice part. It’s more the theory part. I guess that’s what some of the program has to be, theory. But we’re always striving to constantly link theory and practice, and I think a lot of Lee’s course, I won’t be able to practice until I become a principal. I think the information he’s teaching us is great, but it’s more traditional college. Fellow A

Two other Fellows had similar views; we quote one of them here.

I guess in reading some of the case studies you might think of something – they might approach it in a way you wouldn't, so that in another interaction, you might think, "OK, this isn't going anywhere," and you might change the way you approach things. But I wouldn't say there's a whole lot of use. It's more just theoretical pieces. Fellow F

Finally, one Fellow thought that the course, while potentially interesting, had several flaws. First, she suggested that the course could move along more quickly: "I think we could cover the information in a shorter amount of time." Second, the material and discussions, from her point of view, were dealt with superficially most of the time: "They're too much on the surface around theoretical concepts. We never dig deep on the theoretical concepts." Third, when the discussions were somewhat deeper: "they are about things I've had a ton of experience on. So it's very hard for me to sort of resonate." (Fellow B)

We are puzzled by the fact that it was the modules on leadership, the central work of a principal, that generated such mixed responses in our sample of Fellows. In particular, we wonder why the Fellows who thought the content was interesting and important (and to whom it was not familiar) did not find ways to experiment with it in their residency schools. We do not have data with which to answer this question, but suggest that the finding may be related to the heavy focus Fellows had on doing the project work in which they were engaged. It may be related, for some, to the idea that in doing the projects they were not engaged in genuine leadership activities. And, it may be related to the absence of someone on-site who could help Fellows take the four frames, for example, and use them to reflect on the context of the Fellows' work. Perhaps it is too difficult for most Fellows to make the connections without "coaching" help. We think it would be possible for mentors to coach Fellows in this critical work because we know that some of the mentors are familiar with the frames from their own graduate studies. Those who are not already familiar with them might learn about them during an early mentor training session. Perhaps they would find it interesting to look at their own schools through different analytical lenses.

There may be other explanations for these findings and we think it would be valuable for the faculty and SLI Executive Director to take some time to develop some hypotheses and test them with the goal of making whatever adjustments might be necessary to help Fellows make the most out of these modules.

The Seminar. The Seminar was designed to provide "an opportunity for Fellows to explore monthly themes in depth, and to address other topics prioritized by the group." (BPF Handbook) The seminar was also intended to provide "Fellows a chance to organize and facilitate professional development, and receive feedback on their work." (BPF Program Document) Meeting twice monthly, program leaders planned for the first session to enable Fellows to a) assess what they knew about the theme, and b) determine what more they wanted to learn. The second monthly session would be designed for Fellows to share their learning and/or bring in guests who would speak on the theme.

All of the Fellows reported that the seminars failed to meet these goals. First, we learned that Fellows were never clear about the purpose of the Seminars despite the ways in which it was explained to them in the Handbook and by the program's Executive Director.

I never was really clear about those seminar sessions. I think they were a little bit all over the place. I didn't find it all that useful for myself personally to spend that much time either processing information as a group, or doing lengthy check-ins, etcetera. I mean, time is just too valuable this year. Fellow B

We all kind of pushed back on the seminars, because they felt very contrived, overly contrived. I think they're to support what we're doing, but I don't have a clear understanding, I don't know what the requirements are in terms of time. I don't know if there's some amount of course work that we're getting by doing those seminars. Fellow E

Second, while Fellows understood that they were to have an opportunity to figure out what they needed to learn about the seminar's monthly theme, they thought that the process of figuring that out was a poor use of their time.

I don't know if that's the best structure. As far as spending the whole period trying to figure out what people know about a topic, that's not a good use of anyone's time. I would rather have some of the discussions we don't have in class, or work on some actual things we're doing in our schools if it's related to the monthly topic. But we were making up activities because we had to make up activities. Fellow F

Third, Fellows were puzzled by the role they were to take as facilitators of the sessions and generally agreed that they did not have enough time to actually prepare for the additional course sessions.

There was never really clarity, like what was our role in them. I was one of the people at the very beginning of the year who was supposedly facilitating the meetings. I thought that was kind of a loose term, and I was told, no it wasn't. But by the middle of the year, it was clear that people were getting too stressed out about the seminars. And there was too much responsibility being placed on Fellows for developing the seminar program, and we just didn't have time for that. So I just think it was the one part of the program that just needs to get re-thought. Fellow B

Fourth, Fellows did not value the seminar's intended opportunity to practice facilitation because they believed they had ample opportunities to practice these skills at their schools under the tutelage of their mentors.

The seminars are not that useful. I think you'll probably hear that from everyone. We're supposed to structure them, but at the same time it's also, the person who's facilitating is being watched for facilitation, so they feel like they have to put on a show. Fellow A

Well, I guess another purpose of the seminar is that you have some practice facilitating. But it's almost a little bit silly, because if you're at this point, I assume you've been facilitating lots of things. So I don't know – it's good to get feedback about how you're doing or whatever, but it's more just another responsibility than – I don't know if that's the place where I'm like, oh, OK, now I get to be a facilitator, because I run meetings almost every day, and I have in the past. So it's not really a new experience, it's another thing to do. Fellow F

And, fifth, the seminars presented Fellows with dilemmas related to their evaluation by the SLI Executive Director and Program Coordinator. Fellows had thought that in taking responsibility for shaping the seminars, they would have the opportunity to speak freely about their mentors, schools and challenges in the BPF program. However, by mid-year, Fellows came to believe that they had to be careful about what they said and how they said it due to the presence of the program's Executive Director and Coordinator. The seminars, in other words, which some Fellows had thought provided them with a safe space in which to be themselves and talk freely, albeit focused on issues of their program, became a setting in which they felt constantly evaluated and potentially vulnerable.

The design of the seminar included a formal evaluation meeting at the end of each month between the Fellows who facilitated the seminars and the program's leaders. Therefore, Fellows knew, at some level, that they were being assessed and would receive feedback on their facilitation skills.

However, Fellows did not understand that their conversations, not only their facilitation skills, would be noted and used for assessment purposes. As it became clear to them that their comments were being recorded, they found participating in the seminar somewhat unnerving. It became a setting in which the Fellows experienced considerable pressure. The pressure was increased when Fellows feared that their comments in the seminars were not held in confidence. As a result, some of them reported that they thought carefully about what they said in the sessions.

Throughout the year, I struggled with: how much do you say in seminar about the truth? How much do you just play the game? So, two weeks ago, I talked [freely]. And then afterwards I went, "Why did I do that? I shouldn't have told her anything; I should have kept my mouth shut." And you need to speak because it helps you grow, but who you say it to is very critical. I keep my mouth shut outside of seminar all the time. I never say a word to any of the people in the district. But at the same time, you think that you can trust your director of the program.... Fellow A

Sometimes I think that if what you want is support, some of that has to happen in the more social cohort setting. And so some of these are going to seem like harsh comments. But if I'm having a challenge at my school and I'm really puzzled about how I want to approach it, and I bring it to seminar, [I don't want] Rachel Curtis and [the Program Coordinator] sitting in the seminar, taking notes about how I'm presenting the challenge

and how I'm reacting to information I get back. So for me, [I never brought] certain things to the table. Not that I didn't want to talk about them, and wouldn't have benefitted from having a conversation. But if you feel like you're on a year-long interview, and the people that are writing a recommendation are taking notes on what you find challenging, then I think you automatically start censoring how you're going to present that information....Because we would get feedback from Rachel, in particular, where she would quote things we had said in seminar about challenges, or ways we have responded to other people's challenges. It was part of her assessment of how we were doing in the program. Fellow B

We feel that Rachel and [the Program Coordinator] are watching and taking notes on everything we do, so it's another performance assessment, they're taking notes on it all and later they'll discuss and say, "[Name of Fellow], you cut this person off," or things like that. Which are important. But it makes it difficult to actually have a conversation. Fellow C

The SLI Executive Director knew that the seminars were not fully meeting the goals of the SLI or the Fellows. She explained that part of the reason had to do with timing: four hours at the end of a long work day was too long. In addition, sessions were well-designed by the Fellows only when they were already expert in the theme and could bring resources and experiences to share. As a result, the quality of the sessions varied considerably. As a result of these reasons as well as others we have identified above, the Executive Director understood that the buy-in of the Fellows for the seminar varied.

As a result of the seminar experiences during the 2004-2005 school year, the SLI Executive Director and the faculty have been developing a new format and focus for this program component. The seminars, however, will still include a facilitation component. Several Fellows reported that they were aware of the changes and appreciated that their input had made a difference.¹⁹

At this time, we want to comment on the Fellows' concerns about feeling that they were constantly being evaluated and, as a result, had to censor their comments. Certainly those who lead the program want to take all available opportunities to listen to the Fellows in order to determine what they are learning, how they are thinking about what they are learning, and how they share that knowledge with their cohort colleagues. Observing and listening over the year can provide the SLI with a great deal of information about each Fellow's development and contribute to their overall evaluation. The information gleaned from observing and listening can inform the three-way conversations between mentors, Fellows, and the SLI Executive Director by helping highlight areas in which the Fellow may need further practice.

¹⁹We will inquire about the next cohort's experience of the seminar in the second year evaluation study.

However, given the intensity of the program and the high stakes that accompany the Executive Director's assessments of each of the Fellows, we think it is essential for her to make transparent her role in their evaluation and the ways in which she collects the data she uses in forming her judgments. If there are settings in which she is "just a colleague," Fellows need to know that, too.

The Executive Director, like the Fellows when they become principals, will always be in the dual role of providing support and, ultimately, making judgments about other professionals. The discomfort that Fellows experience in this context is understandable, yet likely inevitable. It would likely be helpful for everyone involved if the Fellows and Executive Director discussed this relationship early in the program and then at other times during the year, if necessary.

II. D. Conclusions. The BPF is designed to provide prospective principals with an intensive, thoughtful, year-long learning experience that leaves them prepared to take on leadership positions in the BPS. In this report, we presented what we learned about each of the program's components indicating the ways in which the program appeared to be meeting its goals and those of the Fellows. Where possible, we offered suggestions for the program leadership and faculty to consider.

Before concluding this report on what was a successful year for the Fellows in our sample and the BPF program as a whole, we want to present our thinking about several aspects of the program that did not fit neatly into the organization of the BPF section of the report.

Program Intensity. Fellows and mentors referred often to the "intensity" of the BPF program and the demands of time and energy required of both Fellows and mentors. Fellows, in particular, described challenging workloads, long days in the schools, and the considerable amount of time outside the residency and course meetings that they spent completing course work assignments. Most Fellows indicated that they expected an intense year, and some reported that they thought the intensity was good preparation for the principalship itself. At the same time, Fellows also noted the challenge of balancing the three program components and their responsibilities outside of the program. Fellows in our sample who took on school leadership positions while completing the BPF program were particularly clear about the additional challenges associated with adding this significant component to their workload.

We do not know whether the components, taken together, add up to greater than reasonable expectations for the Fellows and the program. However, the SLI leadership may want to consider the intensity of the program in light of the type of people they are trying to attract. They might ask: how well does the program build in flexibility so that Fellows can deal with the day-to-day challenges involved in managing personal relationships, familial responsibilities, and the program? And, if it remains possible for Fellows to become principals or temporary acting principals during the year, the leadership might well want to consider how to adapt the program in light of the Fellows' changed circumstances.²⁰

²⁰In making this suggestion, we remain aware that the SLI must continue to meet the state's requirements for certification and the University of Massachusetts' requirements for an advanced degree or certificate.

The Challenge of Being a Student. It is never a simple, purely positive emotional experience for professionals to return to school full-time. Individuals give up jobs at which they were competent to become students in areas where they are not yet competent. For many, the transition is from positions in which they had considerable authority to positions, fundamentally, in which they have little, if any, authority. In the new setting, their expertise may not be, or may not seem, valued. Although many adults who leave their jobs for full-time study negotiate these changes with equanimity, for others, the change in status is more challenging.

There's a huge loss of identity that happens in this program for people who have been in a decision-making role and then come into this program. And there was very little attention paid in this program to dealing with that disconnect. And I think Rachel Curtis acknowledged that. I don't think people get what that feels like. Fellow B

We came into this program as extremely qualified, capable people. But I feel like I've been demoted from a year ago. I'm not sure why it's that way. Fellow A

Although only a small number of Fellows in our sample had this experience, we think it is worth noting so that the program can address the issue early in the next cohort's experience, let them know that it is a normal experience, and help them realize that they are developing a new identity and status which they should achieve by the end of the residency year.

Written and Oral Feedback. We want to note two issues that are associated with feedback. The first relates to Fellows' concerns about how to provide their mentors with feedback about their schools. The second relates to the ways in which and extent to which Fellows get feedback from their mentors and the program's leaders.

With respect to the first issue, some Fellows expressed concerns about communicating honestly and openly with their mentors.²¹ This issue arose when Fellows wondered about some of the leadership practices in place at their schools and/or had questions, for example, about the kind of school climate that had been established. While the program's Executive Director encouraged Fellows to inquire about practices that puzzled them, Fellows were reluctant to engage in what might be perceived by their mentors as critical commentary. Fellows were quite aware that their mentors held leadership positions and were well-regarded in the district. As such, Fellows did not want to risk the chance of alienating their mentors and, thereby, their chances of becoming principals next year.

Near the end of the 2004-2005 school year, we understand that the program leaders were considering how to teach Fellows some strategies that might help them have "difficult conversations" with their mentors. Learning to have difficult conversations will be very important for the Fellows in their future roles as principals. And, in those roles, it will be

²¹We noted that Fellows raised a similar concern related to commenting about problems during their seminar sessions when they worried they might be negatively evaluated by the program leadership for highlighting their deficits/challenges.

essential for them to have the skills with which to have difficult conversations with their supervisors (deputies and the superintendent). In the BPF/SLI context, it is important that Fellows can raise difficult issues to the program's leaders, too. However, we urge caution in suggesting that Fellows have these conversations too early in the school year, before they have had the opportunity to fully understand the school contexts and the issues with which their mentors are grappling. We raise this concern so that the program avoids situations in which Fellows have "jumped to conclusions" about aspects of their mentors' leadership.

With respect to the second issue, the feedback that Fellows receive from the program leaders and their mentors, we make several comments. First, as we noted earlier in this section of the report, Fellows report that they got little, if any, evaluative feedback from their mentors. Second, if they got feedback, it tended to be oral rather than written. As a result, Fellows reported that they did not get enough feedback and what they got left neither them nor their mentors with any record of their development over time.

I think that one piece that the program is really missing is written feedback. There's absolutely no written feedback anywhere. There's no documentation of anything anyone has ever said to you, other than Rachel Curtis' personal notes. I don't know if mentors write up something that they keep; I have no idea. But Rachel Curtis does not give us written feedback. And I think it would be nice for the mentors to give written feedback because you're more specific and you're more thoughtful when you have to put those things in writing. Fellow F

Mentors agreed that they did not provide formal, written feedback to Fellows. One mentor acknowledged that she is not apt to provide it to anyone.

It's not written feedback, it's just more talking, one on one. . . . I don't do written feedback with my teachers. I just don't have the time. Mentor C

While we understand that the BPF program would not want to burden mentors with additional work, we think it is worth considering what the mentors could do that would provide the Fellows with the kind of feedback they desire. Perhaps Fellows and mentors could audiotape one or more conversations in which the mentor provides evaluative feedback. Perhaps the Fellows, mentors and program leaders could brainstorm additional options.

On a related theme, Fellows were also concerned that they had no written feedback from Rachel Curtis. This was particularly troubling since they knew she was evaluating them and their readiness to take on the principalship. One aspect of Fellows' concern was simply not knowing what she thought and having no official forum, other than the Learning Contract conversations, in which to learn her thoughts. But, another aspect of concern arose because Fellows were not sure of the basis on which they were being judged. Several reported that they feared being judged in light of their course and seminar work rather than their actual leadership work in the schools.

I still feel like feedback is a missing link in the program. Partly because Rachel and [the Program Coordinator] don't see us a lot in the residency, so they only get a small piece of what we are doing. They might comment on how I am as a student, but I'm not sure if how I am as a student is going to help me next year as a principal. So they give me feedback on how I am in class. I haven't gotten bad feedback, so I guess that's good. But, I'd also like some more, even if it's not positive feedback. Where do I need to grow? Where do I need to learn? And occasionally Rachel, if I ask for it, will give that kind of feedback. But I feel like she has a lot more information that she doesn't share. You know that there's a lot going on in her head. Fellow A

Rachel Curtis gives feedback, and some of it's useful. But so much is collected from this very thin group of sources [the classes], because Rachel doesn't spend much time with us [in school]. And she'll give feedback and I'm thinking, "Where are you getting this from?" Fellow E

It should be possible for the program to provide Fellows with written feedback at reasonable points during the residency year. It may be that more systematic use of the Dimensions of Principal Leadership rubric would suffice. But, it may be that aspects of Fellows' performance should be evaluated with more narrative feedback. Regardless of the specific tools that might be used, there would be benefits to the program as well as to the Fellows in doing this. Feedback would likely reduce some Fellows' anxiety. And, in situations where Fellows' progress is not sufficient to conclude that they would be able to take on the principalship at the end of the program, the formal feedback would have made this clear to the Fellow in a timely fashion. Providing written feedback would, we think, increase Fellows' trust in the program's leadership.

Clarifying Administrator Options. The BPF component of the SLI is designed to educate principals for the BPS. Those who apply for admission to the program anticipate that they will take on principal positions at the end of their Fellowship year. However, two years of BPF experience make it clear that multiple factors can lead those who graduate from the program to find themselves in a range of positions. For example, there may be an insufficient number of principal openings for all of the Fellows who successfully complete the program. Or, some Fellows may not be quite ready to take on the role of the principal without the additional learning opportunities provided by spending a year or more as assistant principals.

For these reasons, and for others that may arise as the third cohort of Fellows completes its work in the spring of 2006, it is appropriate that the SLI leadership lets Fellows know, from the outset and at a number of points during the year, that one successful outcome of the program is placement as an assistant principal. However, this information is difficult for Fellows' to hear, given their personal goals. And, from the program's perspective, there is need for caution as well as honesty in presenting this information. On the one hand, it is important for the program to provide the information in general terms. On the other hand, it is important that the program not make decisions about the readiness of individual Fellows too early in the year. Experience has shown that some Fellows who do not look "ready" to take on the principalship in January may be quite ready by June. Others, however, may not be quite ready. Therefore, the program

reminds Fellows of the range of positive outcomes they can achieve, and it reserves judgment about their individual status for as long as possible.

From the Fellows' perspective, any news suggesting that they will not be principals is difficult to hear.

You start the program thinking, "Headmaster," and sometime in December or January/February, we heard, "Headmaster or assistant headmaster?" All of a sudden the language is changing around what job you're being set up for. And I think that's just something that people should be conscious of in the program, either by admitting that the shift has happened, or from the beginning, saying "Headmaster or assistant headmaster." Because then if you do decide to go assistant headmaster, or if you have no choice, it feels like a demotion. And whatever; in the long run, who really cares? But, the culture of the program is pushing for headmasters, when in fact there may not even be jobs available for everybody to do that. And some people may not be ready for it, but then it's harder to admit that you're not ready for it if you've been trying to make yourself think all along, "Headmaster." Fellow E

The next Fellow's comment reveals how difficult it will be for some Fellows to accept the logic that an assistant principalship is a step forward. For this reason, it is important for the program to hold the principalship as the ultimate goal while continuing to emphasize, from the beginning of the program, that an assistant principalship offer graduates a valuable administrative experience that will advance them as instructional leaders.

I refuse. I did not come into this position to be an AP. I *won't* be an AP. I *don't* want to do discipline for a year, and that's almost all the APs I see do. So I don't know what I'll do [if I don't get a principalship]. Relax for next year? I don't know. Fellow A

Finally, it is important for the BPF program to include discussions of the assistant principalship in their feedback sessions with Fellows as a way to support Fellows when their mentors, and the program leader, conclude that particular Fellows will not be ready to assume full leadership positions immediately upon graduation.

There needs to be some thinking about how and when the program tells Fellows it wants to send them directly into schools as principals. There may be a need to have a multi-tiered structure going on. I don't know if Rachel waits too long, to sit people down in the early stages and say, "I'm working with you, but this is where I see you in terms of the spectrum, the principalship, assistant principalship, or whatever." What I wouldn't like to see, and I'm not blaming Rachel, and this can happen to all of us as leaders, we get busy and we keep saying, this is not the opportune time, this is not the opportune time, and then the Fellow thinks she's moving towards a principalship but it isn't going to happen. Mentor A

We think there is another reason for laying out the job options that accompany the BPF program. It is connected to the worries Fellows have because they feel they receive little formal feedback.

In the 2004-2005 school year, two Fellows were selected mid-year to become principals of new, small high schools. These Fellows likely were evaluated by the BPF leadership and by their mentors as well as by the school selection teams and the superintendent. Therefore, Fellows were fully aware that a form of ongoing assessment was influencing judgments about them and was putting them into some kind of order regarding their readiness for the principalship. Indeed, two were deemed ready to be principals well before finishing the program and were, as a result, excused from its residency requirement. Yet, Fellows had no written or even oral feedback about the form, content, and focus of the informal evaluations that had led to decisions about their readiness. Other Fellows, with what they felt was similar scant feedback, learned later in the school year that the program leader thought they should pursue assistant principalships.

Although there may be no new schools that need principals in the middle of the next school year, there may be other circumstances that lead the district's leaders to identify Fellows who can assume leadership positions while in the middle of their BPF program. We are concerned that without more transparency in the BPF system of Fellow evaluation, and without Fellows being completely aware of the options they may have as a result of their participation in the program, some degree of dissatisfaction and distrust may develop. Therefore, we suggest that the program leaders consider whether they share our concern and, if they do, determine how best to address it.

Program Impact. Overall, our data analysis led us to conclude that the BPF component of the SLI was successful in providing Fellows with a broad set of school-based experiences from which they could learn what they needed to know to begin their careers as school leaders. The program engaged Fellows in a meaningful set of courses designed to extend and deepen the knowledge they will need to serve as high quality instructional leaders in Boston. And, the program helped them to develop and sustain a cohort experience that offered support during the residency year. Even Fellows who raised questions about the program's design, their school assignments, course requirements, or course assignments, by the end of the school year, were clear that they had learned a great deal that would serve them well as principals. No one with whom we spoke regretted having spent the year as a BPF.

This definitely was a great, great opportunity for me. I was ready for a change in my position. I was ready to grow, to think bigger. I'm developing, through a lot of self reflection, of really thinking deeply about who I want to be, what kind of leader I want to be. I think that some of the actual application of it has to wait until next year....Overall, this program is phenomenal. I'd recommend anyone to come into it, but I would always say, there are real challenges. With everything there are real challenges. Fellow A

I definitely learned a lot. I think I've definitely transitioned some, just in terms of how I see myself. Having come straight out of the classroom, I think I've transitioned from thinking of myself being a teacher to thinking more of being an administrator. I think I'm

constantly learning in this program, and there are a lot of different opportunities to do that, which I'm very grateful for. Fellow E

I thank God every day that I was in the program, because I don't know how I'd do the job if I hadn't gone through the program. And when I first started this, as I think many of us have said, I was like, "Oh yeah, this is a hoop to jump through because it'll help me get to where I want to go." I don't think there was any real understanding when I started that this would actually be an incredibly useful program. I certainly didn't think I would do a lot of growing, like personal growth. And I have to say both happened: an incredible amount of personal growth, and I could not do the job if I didn't have this program behind me....Rethinking leadership style, understanding that everything I do has to be about creating a learning community. I think when I started this, I saw the job of a headmaster as a management job. Now I see it as an instructional leader job. And that's a pretty big change. Fellow B

I think that I've learned a lifelong lesson here: that leadership in public education and teaching in public education is hard. It's hard for the kids who come here, a lot of them, and it's hard for the teachers to stay....And I also appreciate that the principal here works tirelessly all day. She's here late, she puts every effort into it, and it's still going the way it is. So that would give me some appreciation: to see a school that may not be achieving the way it wants, may not have the behavior the way it wants, morale or whatever. And then to really appreciate it and say, "Well people are doing the best they can." And so it gives me aspirations of doing more. Fellow C

Mentors, too, gave the BPF their vote of confidence.

I think that Boston is moving in the right direction with the Fellows program. This is great. . . . The whole concept of the program to me is to give people a deep understanding and hands on experience of leadership, but not to let one area or component drain the significance of the others. In other words, don't let the practicum piece outweigh the theory and don't let the theory outweigh the practicum. And [continue to] be cognizant of the need to be reflective on the tie-in between both. Mentor A

Other mentors spoke about the importance of preparing new principals who were interested in the BPS in particular. They believed that the program would help the district keep its focus on the Essentials of Whole-School Improvement and insure their implementation in all of the district's schools.

As another indicator of success, the six Fellows in our sample completed the program and graduated in June. At this time, three of them have positions as principals in the BPS and three have positions as acting or assistant principals.

During the second year of our evaluation, we will follow a sample of these Fellows and one or two who were not in our sample to learn about their experiences as first-year principals or

assistant principals and about their retrospective views of the program in light of these experiences. After all, the BPF program's success rests on the quality of school leadership its graduates provide for Boston's schools. We look forward to this next phase of the evaluation of the BPF.

THE BOSTON SCHOOL LEADERSHIP INSTITUTE:
2004-2005 EVALUATION REPORT

Section III
The New Principal Support System

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Education Matters, Inc.
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III. THE NEW PRINCIPAL SUPPORT SYSTEM

The purpose of the New Principal Support System (NPSS) is to assist new principals in becoming strong school leaders. NPSS aspires to create a customized system of support and a learning community for principals in their first two years in the position. The NPSS includes mentoring by successful principals, monthly seminars, and school-based consultations to address the challenges and obstacles faced by novice principals. This program serves 25 first- and second-year principals. Education Matters' evaluation during the 2004-2005 school year focused on the supports provided to first-year principals.²²

SLI designed the NPSS in order to address the challenges new BPS principals face, challenges associated with the tasks that principals need to accomplish, but for which they do not yet have a network of colleagues on whom to rely. In the 2004-2005 school year, the NPSS provided first year principals with the following supports with the goal of addressing these multiple challenges:

- *The New Principals Institute*, an intensive, five-day program designed to orient first-year principals to the district and to provide them with essential preparation for their first year on the job;
- *The New Principal Network*, a group for first-year principals that met monthly throughout the year in order to provide new principals with support in the context of a community of learners²³; and
- *Individual mentoring* for first-year principals provided by experienced BPS principals.

Network meetings would have a focus on principals' work and, if facilitated well, would forge new principals into a "community of learners" who could support each other in developing their knowledge and skill with respect to their new roles. Individual mentors could provide targeted assistance to the new principals and, in addition, could help them develop connections to other principals and to administrators in central office who would be important to their success.

The SLI had also intended to provide what it called "Just-in-Time" training sessions for first- and second-year principals together. These sessions would have focused on key principal responsibilities at the times when they were likely to be at the forefront of principals' work. Responsibilities would include, for example, developing the budget and the Whole School Improvement Plan (WSIP). However, upon realizing that it was asking new principals to participate in too many meetings, the SLI placed many of the "Just-in-Time" training topics into the agenda of the first-year New Principal Network meetings. Other "Just-in-Time" training

²²We will add a focus on second-year principal supports to our evaluation during the 2005-2006 school year.

²³NPSS support for second year principals included a parallel Second-Year New Principal Network and individualized, school-based consultations.

sessions continued to take place separately from the Network meetings, as originally planned, and were available to first- and second-year principals.

In collaboration with the SLI Executive Director, we chose a sample of nine new principals who represented three sub-groups within the total set of new BPS principals in 2004-2005. These sub-groups were: 1) graduates of the BPF program, 2) principals promoted from other positions within the district, and 3) principals hired from outside of the district. We interviewed each new principal and her mentor twice during the year. In addition, we observed New Principal Institute sessions and three first-year principal Network meetings, a meeting of new principal mentors, and the three mentor-pair training sessions that were provided as support for the mentoring work. Finally, in order to learn more about the challenges new principals faced and how well the NPSS supports, taken together, were addressing them, we observed an ILT meeting at each new principals' school and interviewed a small sample of teachers and coaches to learn about the challenges the school faced and the way it was organizing to address them. We collected these data with the expectation that they would help us understand something about the context in which each principal worked. The ILT observations helped focus some of our interview questions.

We begin our discussion of the findings by highlighting several key findings that emerged from the data. Following this discussion, we present our findings as they relate to each of the three components of the NPSS: 1) the New Principal Institute, 2) the New Principal Network, and 3) mentoring support. Our analysis does not present our findings as a function of new principals' prior experiences or educational background (BPF graduate or not). This is because a) the sub-groups were not as distinct as the program's Executive Director and Education Matters had expected, and b) there were scant differences based on prior experience or educational background.

With respect to sub-group differences, we learned that two of the three new principals placed in the third sub-group, principals hired from outside of the district, had in fact worked in the BPS in the past. In addition, intra-sub-group variation in challenges was greater than variations between the groups. For instance, some BPF graduates had gone from the classroom to the BPF program; whereas, others had administrative experience before entering the program. Some principals new to the district had extensive administrative experience. For others, this was their first administrative position. Likewise, the schools in which they worked varied by size and level, and each school brought with it challenges and strengths forged by its own particular history and staff.²⁴

The principals in our sample, however, did share one characteristic in common: they were new to their position. They might experience that newness differently as a result of prior experiences and school-based conditions, but being new led to some common needs that the NPSS could address. Indeed, the NPSS designed its Network program component on the assumption that

²⁴In the small number of instances in which there were sub-group differences, we have noted them.

novice principals' needs were similar enough that they could be attended to through the development of a community of learners in which *newness* to the position was the essential unifying factor. The challenge for the NPSS was then to determine which needs could be addressed effectively in a learning community comprised of principals whose unifying characteristic was newness to the job. Remaining needs might then be better served by individual support from the mentor and/or by other supports provided by content area specialists, or the deputies and Cluster leaders, for example.

Overview of the Findings

- The key challenge for the summer New Principal Institute's developers was to provide a diverse group of new principals with an orientation to the BPS and to the principalship in the district. Our data lead us to conclude that the Institute's practical focus on entry engaged the full group and served as effective preparation for the school year. New Principal Institute sessions that provided an overview of the district's departments and instructional approach, however, were less useful to most of the principals in our sample.
- More than half of the new principals in our sample reported that the monthly New Principal Network meetings were quite beneficial to them in their first year. These new principals identified two main Network benefits: 1) the value of coming together to learn with a group of first-year colleagues, and 2) the importance of the topics that were addressed in Network meetings. Other new principals reported that the specific topics presented and/or the way in which they were presented were of less use to them.
- The BPS provides all of its principals, new and experienced, with a myriad of opportunities to work with and learn with colleagues. The New Principal Network is one of them, the one focused specifically on new principals. While our data confirm that some new principals found that the Network complemented the other supports, the monthly Network meetings were, in effect, an add-on to an already full slate of professional development activities, some of which new principals found to be more useful than the support provided by the Network. In the 2004-2005 school year, NPSS had not yet developed its niche within the context of the array of supports and professional development provided within the district.
- Of the three components that comprise the NPSS, mentoring provided the greatest level of and most useful support to new principals in our sample. The effectiveness of mentoring rested upon mentors' ability to provide targeted, individualized support to the new principals.

We now turn to a discussion of our evaluation findings with respect to the New Principal Institute, the New Principal Network, and the Mentoring components of the NPSS.

III. A. The New Principal Institute. The New Principal Institute was a five-day program implemented over the course of two weeks in the first half of July 2004. The Institute was designed to provide new principals with an orientation to the district and with essential preparation for their first year on the job. To this end, the Institute provided an overview of a) operational issues in BPS, b) key district departments and administrators, and c) the district's instructional approaches. In addition, the Institute included workshops designed to help principals identify their core values as leaders and to develop individual plans for entry into their schools. The New Principal Institute marked a significant change from the one-day orientation the district had provided in previous years.

The SLI Executive Director recognized the challenge presented in providing one orientation experience for a diverse group of new principals. She realized that new principals may need a differentiated experience depending on their individual strengths and needs. However, she also considered the benefits new principals could gain from sharing their diverse experiences and forming connections to a group of colleagues, particularly in the summer when they were beginning to establish themselves in a new role and, for some, in the district. SLI designed the Institute as a collective experience with these advantages in mind.

Overwhelmingly, new principals reported that the sessions focused on entry were highly valuable to them as they prepared for the beginning of the school year. New Principal A's comments sum up the importance most principals placed on the time and structure the Institute provided them to address what was, for many, a challenging task.

[The Institute gave us] time to clarify how we wanted to communicate our expectations to people, what was really important to us. . . . I have a good appreciation of the importance of doing that, but it was thoughtfully done. And giving us time because that's the kind of thing that it's easy to never sit down and actually work on. So, the fact that they sat us down and said, "OK, now work on, 'What are you going to say to your faculty when the first day of school comes around?'" You have to think that all through. So doing that was helpful." New Principal A

Most of the principals reported that they were satisfied with their introductions to staff and with the professional development activities they planned for the days immediately before school started. They had begun planning their introductions and the professional development during the New Principal Institute.

Principals did not share a common perspective, however, on the way in which they were introduced to central office administrators and department heads. A small number of new principals reported they were able to assimilate the information presented and make use of it during the school year. Included in this small group were principals who a) had limited prior administrative experience in the district and/or b) had prior administrative experience, but were new to the district. These principals reported that most of the content was, indeed, "new" to them and that they found it and all aspects of the Institute to be invaluable to their preparation for

the year. They commented about how they turned to their Institute materials as reference documents throughout the year.

Getting to know the processes of BPS and the people of BPS, it was great. . . . I think the New Principal Institute was a wonderful thing, and I can't imagine, previous to this, that it was done in a shorter period of time because there was something very important and new each day of the program. Going through financial stuff with the budget people, going through the Human Resource process, going through curriculum and the expectations for schools around curriculum level and testing and assessment, they're such critical areas that you need to run the school. I can't imagine being here without having that knowledge. It gave me a great base to start with. I know where to go to find information. I know who to go to. It was just very thorough. New Principal B

The majority of new principals in our sample, however, reported that the information was repetitive of what they had already learned through the BPF program or their experience working in the district. Even those who found the material familiar often noted that the amount of information and its presentation, which many described as a parade of central office administrators and department heads, was "overwhelming."

A lot of it was very similar to what we had done in the Principal Fellows Program. There wasn't a whole lot of new information there. New Principal C

I think it might have been really helpful to some people but it wasn't really that helpful to me. Because I'm [already] in the district. They brought in everybody under the sun to say a whole bunch of stuff that I already knew. It was stuff I didn't need to know about, because I already knew about it. New Principal A

Finally, a small number reported that the Institute did not provide them with information that would be critical as they prepared for the school year.

It was kind of linear in that – here's the HR people, and a cluster of HR people, and here's the facilities people, and a cluster of facilities people. . . . But how do you get it done? How do you get it fixed? How do you solve the problem in an efficient way? That's sort of my question, and I didn't feel like I got a whole lot of information for that. New Principal D

New Principal D's questions, because they would become specific in her school context, would be better addressed with her mentor than by the whole group presentations. Her questions point to the potential value of the different components of the NPSS. The Institute was designed to provide principals with an initial, broad view of the district's organization and resources.

With respect to our analysis, while some patterns were evident in principals' responses to the content of the Institute, they did not divide neatly into the three sub-groups of BPF graduates,

internal promotions, and external hires. Not all BPF graduates and internal promotions reported that the information in the Institute was repetitive. In fact, in each of these sub-groups, at least one individual found the information to be valuable as she prepared for the school year. Our data leads us to conclude, however, that it is significant that the sessions all of the principals in our sample found most valuable – the sessions on planning entry – focused on a practical and important task that principals needed to complete before the beginning of school.

The SLI Executive Director has remarked that first year principals tend to focus on their immediate needs and practical tasks. This is understandable; they want to get done what needs to get done. Implicit in this finding is the reason for their positive response to the entry component of the Institute: despite their differing backgrounds and school contexts, preparation for entry as a topic was relevant to everyone because they could immediately apply the session's content directly to their own situations.

In contrast, the content offered in the sequential presentations by Human Resources, Curriculum and Instruction, and Facilities, for example, while it might be important in the future, was not the immediate concern of the group of new principals. Principals had an important opportunity to listen to the same presenters and gain some new information. However, for the most part, they could not take what they were hearing and make direct connections to their schools.

We are not suggesting that all information must be practical or immediately useful. Certainly, an orientation is an appropriate setting in which to provide an overview of the district and the key issues principals will encounter in their work throughout the year. The challenge in developing an effective Institute, however, was in presenting information in such a way that it had considerable value for all of the participants, including those who already had a broad understanding of the principalship in the BPS. We wonder if it is worthwhile for these principals to attend multiple sessions of introductions and overviews that are not new for them. Might certain sessions have been optional for new principals who felt they were sufficiently familiar with the BPS organization and resources? Might these principals have valued some topics presented in greater depth, given their baseline knowledge? In addition, given the small number of principals for whom the Institute's content was new and considered valuable, we wonder whether there might be a) other ways in which to introduce new principals to this knowledge, and b) other knowledge that might be more immediately beneficial to them, for example, an in-depth consideration of the district's WSIP document and process.

In making this suggestion, we recognize that the Institute will always have to strike a balance between focusing solely on new principals' immediate, practical priorities and the larger conceptual issues related to the principalship and the district's theory of school improvement. Both are important. Perhaps, if the district has established clear expectations for first-year principals, the Institute could use these to work backwards and determine how the Institute, as

the initial form of professional development for new principals, could begin the process of developing principals who could achieve those first-year expectations.²⁵

III. B. The New Principal Network. The first-year New Principal Network was a series of monthly meetings, designed by the SLI to create a community of learners among the new principals. The Network was facilitated by two experienced school and district leaders with considerable knowledge of BPS, Irwin Blumer and Janice Jackson. The SLI Executive Director also attended Network meetings and contributed to group discussions. She did not serve as a lead facilitator.

At the first meeting of the Network, Irwin Blumer explained to the new principals what he saw as the chief advantage of its design: it was a forum – and possibly the only one – in which new principals could speak freely about their work without worrying about the impression they were making on more experienced principals and/or on their deputies. The Network’s design also called for the new principals to develop each meeting’s agenda in light of issues they identified as important. To accomplish this, at the end of each Network meeting, principals would identify topics for the next one. SLI leadership made one adaptation to this initial plan in light of feedback from the novice principals about the burden of numerous meetings. In the fall, the Network began to incorporate some of the “Just-in-Time” training sessions that had been planned for first- and second-year principals into the Network meetings.

More than half of the new principals in our sample reported that the Network was quite beneficial to them in their first year. These new principals identified two main Network benefits: 1) the value of coming together to learn with a group of first-year colleagues, and 2) the importance of the topics that were addressed in Network meetings.

Forming a community of learners. More than half of the new principals in our sample reported that the learning community aspect of the Network meetings was helpful to them. Several of these principals described conversations that had taken place in Network meetings through which they “commiserated” with others and which reminded them that they were not alone in experiencing challenges.

They’ve been helpful in terms of being able to talk to some other people who were very much in the same boat that I am about the challenges that I see daily, about what’s working well, about having somebody understand what you’re going through, and getting ideas from them on how they’ve been handling and doing different things. You see all of us sitting around the table and as each person’s talking, somebody’s writing, “Ooh, that’s a good idea!” You get down in your notebooks little things that you hear from others. Also, being able to get some input from Janice and Irwin, from people with just another way of looking at

²⁵As part of this process, the district’s deputies, Cluster leaders, and other administrators could consider how their professional development and other supports help new principals meet those expectations.

what's happening, what you're doing, or how somebody else is reacting to you. They've been helpful. New Principal B

When we start with the beginning of the meeting with the highs and lows of your experience at your school, [it's valuable] just to sit and hear that there are other people who are going through similar situations that you're having as a first year principal, or who are going through more severe situations. Because you always think your problems are the biggest, and then you sit back and hear someone else who you're like, "Oh my gosh! I wouldn't even know how to respond to that. There are situations that are worse than mine. I don't have it that bad." Sometimes people interject and give insight or feedback. And, just to hear that feedback is helpful. New Principal E

And last time we started with a success and a challenge, and it's just interesting to hear that people's challenges are the same across the board, just to commiserate and share strategies for working on different projects. New Principal C

Several principals reported that the opportunities to discuss challenges, share strategies, and develop solutions were often limited to the "check-in" portion of the meetings. Because this component of each meeting was so valuable to them, many of the new principals wished for more opportunities to engage in collaborative problem-solving of individual's challenges. A few, like New Principal D, suggested that the discussions should be formalized through the use of a protocol.

So the point is that those discussions were instrumental. But I felt they should have been focused much more; they should have been handled in a case study or a constructive kind of protocol in which somebody throws out their dilemma and we work it, we really problem solve it, or we develop action research projects that really look at some kind of implementation that we're going to do and then look at what the effect is.²⁶ This is the most creative, most energized group of people I've been with, this first year principals' group....The time we have together should be problem solving and supporting each other, or working on something that's actually research based, I think. New Principal D

As some of the Just-in-Time topics were inserted into the Network meetings, this principal and several others regretted the loss of time that could have been spent on problem-solving. Although, as she says, there is the question of balance:

It became more of what [they thought] we needed to know. Not to say that they shouldn't have little courses like the evaluation and supervision. And, they could

²⁶The second-year principal Network utilized a consultancy protocol to focus on an individual's challenge and develop solutions for it.

have one on budgeting, one on staffing like they gave us, but it shouldn't be [at the cost of] that time together. New Principal D

Therein lies the ultimate tension. On the one hand, NPSS leaders wanted to provide new principals with time to work together as a learning community and with access to specific content that principals need to know. Accomplishing both goals takes a good deal of time. On the other hand, as we discuss below, these new principals had so many demands on their time that they found it difficult to attend the Network meetings whether or not they found them valuable.

We turn now to a discussion of our findings with respect to the topics on which the majority of Network meeting time was focused. In developing our analysis, we asked, did the topics addressed in the Network meetings meet the needs of the diverse group of new principals in our sample? Did the Network meetings address issues that represented real challenges for the new principals in our sample? And, among the components of the SLI and other district supports available to new principals, was the Network the best place in which to address these topics?

Finding the right topics. The majority of the new principals in our sample reported that the value of the Network was closely tied to the topics of the sessions, in addition to the opportunity to talk with one another. About half of the new principals noted that the sessions addressed topics that represented challenges for them or about which they needed more information. In particular, these new principals highlighted the usefulness of the sessions focused on a) developing the school budget and b) staffing and hiring. These topics were among the “Just-in-Time” training topics that SLI incorporated into Network meetings.

The meetings have been great on many different levels, . . . like the staffing and resource meeting. Anybody who missed that meeting, I think, missed a huge opportunity to really shape things up in their school. And we just had the opportunity to meet with Michael Fung, Suzanne Lee, people who have had rich experiences and know how to create “creases” in their budgets and [budget adjustments] to assist their schools. And [we had] conversations about dealing with mediocre and bad teachers. New Principal F

The budget session has been really helpful because they had Mary Russo, the principal of the Murphy School, come over and actually walk through her experience of doing the budget with her school site council members. I thought that was really, really powerful. Because as the first year principal, knowing the steps you need to take, to make sure you work closely with school site council. She even had documents that she brought in to share with us. It made me feel more at ease. New Principal E

Two of the new principals reported that these sessions were especially helpful because they provided them with connections to veteran principals with relevant expertise. These two principals contacted the presenters after the sessions and, as a result, received individualized

technical assistance from them. In describing the sessions, one of these principals noted that it was the access to targeted technical assistance, more than the content conveyed in the session, that was of value to her.

I think [the Network sessions that focused on specific topics] were an appropriate enough time to give you basic, general information. But they also gave you some ideas of who else you can talk to. You could call up these same people who [they brought in]. I actually have talked to [Principal X who] came to talk about staffing. When it got to be time to do budget, pick the staff, and how to handle open postings, moving staff around, I called her [and] talked about how to handle positions so that you get the best people. New Principal B²⁷

Other new principals, including a small number who chose not to attend Network meetings after finding the initial few unhelpful, reported that the specific topics presented and/or the way in which they were presented were of less use to them. Like the principals quoted above, several of these new principals reported needing to turn to their mentors or experienced principals in their Clusters for help with their budgets, their WSIPs, and other major tasks of the year. However, they did not access this technical assistance through the Network. A small number of these new principals noted frustration when they did not receive answers to their questions during Network sessions.

I went to one about hiring, all the HR stuff. And I had HR questions, but they would tell me, “Ask so and so.” And I said, “Well, why did I have to come to the meeting for you to tell me to go ask HR?” New Principal A

Our data suggest that some new principals found great value in the Just-in-Time topics addressed in Network meetings. However, the fact that nearly all new principals in our sample reported needing additional, individualized support with respect to these topics brings us to the question of how NPSS leaders can best focus each component of the NPSS.

Network meetings focused on Just-in-Time topics were designed to give principals usable information about each topic in a timely manner. But, they were not designed to address each principal’s specific questions in depth. In addition, as our data related to the formation of a learning community suggests, new principals in our sample reported that they had few opportunities outside of the check-in portions of the meetings to raise and discuss issues that were challenging them. Yet, raising and discussing these issues had been the purpose stated for the Network at the initial meeting of the year. We wonder if some of the challenges new principals bring up themselves might be better suited to in-depth group discussion and problem-solving than some of the technical and operational topics addressed in Just-in-Time sessions. We recommend that the NPSS leaders further consider which topics to address in the Network

²⁷Most of the new principals found that their mentors, too, could provide this level of technical support. It was not necessary for a large number of new principals to contact the presenters. However, it is worth noting that, by making these contacts, new principals were establishing networks within the BPS.

meetings in light of the stated goals of the Network, the support mentors, Clusters, and other resources in the district may be able to provide in addressing some of the Just-in-Time topics, and new principals' limited time.

Time as a factor in attending the Network. Attendance at Network meetings was often low and inconsistent throughout the year. As we noted above, a small number of principals in our sample chose to stop attending meetings altogether early in the school year. Others reported that the work in their schools and the large number of meetings in their schedules prevented them from attending specific sessions. By spring, principals reported that attendance at the Network declined overall as their attention was drawn to MCAS and other end-of-year concerns. Principals who were attending the meetings regularly reported frustration with the fluctuating participation. They highlighted attendance as a challenge to the formation of a stronger learning community.

In a Network in which a central goal was to establish a safe space for the sharing of challenges, sporadic attendance could significantly compromise the group's ability to develop the trust in one another that is necessary to make it feel safe to share. Certainly, principals' reports suggest that some level of trust was developed and that the group did serve as a support network for most of the principals within it.

The SLI Executive Director was well aware of the pressure principals were under to choose where to spend their time among the district's many offerings and requirements. She did not expect that new principals would always choose the Network which was not mandatory.

I don't think we have it right because I'm aware of how much we're pulling principal's out [of their schools] as a district. I get an email from a first-year principal saying, "I'm really sorry I'm not going to be there, but my Triad has walk-throughs that day." I understand why they're going to their Triad walk-throughs; of course they're going. . . . We have to make some decisions in the district about what matters most. It's not a sword I'm going to fall on because I think you can argue a lot of different things. You can argue that it's really important for a first-year principal to be part of an inquiry group of six other principals [who are doing walk-throughs], several of whom have a lot more experience than them. But, I also think they have some particular needs that they're not going to get [help with] in those places.

Our findings suggest that most of the principals in our sample did benefit from coming together with a group of others who shared the characteristic of *newness*. However, new principals noted that there were other groups that they found useful and to which they often had formed tighter links than they had to the New Principal Network. Newness was not the link in these groups; the link was content and context that mattered to principals.

In my triad professional development, we have three new principals and one third year principal. So, that group, because it's smaller and we have a pathway that

we're on, I really like that [group]. We've said, "OK, what are we going to do with our conversations over the course of the year?" And so we have that continuity of discussion. New Principal A

[It's been valuable] talking with a group of experienced principals, being able to work together to put things together for the teachers here in this Cluster, to build capacity in the teachers. The group of principals in my Cluster have been very supportive of each other. We work and brainstorm on: What are the ways we can improve teaching in the Cluster and in each of our buildings? [How can we] put together and collaborate on workshops, and then allow teachers in our buildings to be part of those Cluster workshops? It's a really good, good group of Cluster principals. I'm glad that I landed here with this group, and they've been very supportive of me individually. New Principal B

[Our] Cluster is excellent; it's an outstanding group of principals. I'm sure all the groups of principals are outstanding, but really, it's a very neat group of principals, very collegial, very professional, very thoughtful. I went to just about all of our monthly meetings. And we actually made it a project to advocate for certain changes in district policy as a Cluster, and brought people in to speak to us about those issues. And, the second half of each meeting was professional development which we divided up by elementary and secondary. I got to spend a lot of time talking with and picking the brains of strong, smart, successful principals. New Principal G

Herein lies a challenge for the NPSS and the Network in particular. The BPS provides all of its principals, new and experienced a with a myriad of opportunities to work with and learn with colleagues. The Network is one of them, the one focused specifically on new principals. Our data lead us to conclude that, while principals participated in and valued a great deal of the support, many were somewhat overwhelmed by the sheer number of meetings they attended and the challenges posed by having to be out of their schools.

New principals were engaged in Cluster meetings, professional development sessions that focused on instructional content such as DMI (mathematics), and professional development inquiry groups. They also met with and were supervised by their Deputies and Assistant Superintendents. Many of these meetings were mandated by the district. The Network, which was not mandated, had to compete for new principals' attention and time.

While our data confirm that some new principals found that the Network complemented the other supports, the monthly Network meetings were, in effect, an add-on to an already full slate of professional development activities, some of which new principals found to be more useful to them than the support provided by the Network. In the 2004-2005 school year, NPSS had not

yet developed its niche within the context of the array of supports and professional development provided within the district.²⁸

Three factors, then, seem to be associated with scant and inconsistent attendance at the Network meetings: 1) the meetings were not sufficiently useful to some new principals to merit the time out of school; 2) other meetings were both mandated and more useful; 3) given #1 and #2, it was difficult to form a real learning community that dealt with issues of concern to new principals. As the district takes stock of the meetings and professional development it requires of principals, both new and experienced, it should be able to determine what specific purpose/niche could be served by the New Principal Network. It should be possible to determine which topics are important to new principals because they pose challenges to virtually everyone new to these positions. And, it should be possible to determine whether the Network could provide more targeted, small-group sessions for new principals who have specific needs that will not be met by the other supports provided by the district.

Moving in the direction of diversifying the Network's offerings would enable the SLI to return to its goal of providing new principals with the opportunity to shape the agenda of their meetings. This would appeal to some of the new principals who did not attend many of the Network meetings and felt that their opportunity to shape the agenda had been lost.

Having a little bit more say in some of the issues [would help]. I think there's been some good things, like budget times and resources and bringing in people like that. But, maybe having opportunities for us to say, "These are some of the things we're willing to work on," and then having kind of a menu: maybe some principals want to work on evaluations, maybe some principals want to work on resources, maybe some principals want to work on climate. So that way you kind of have an opportunity to break out into those small pockets for your needs. New Principal F

Given all of the help that appears to be available to new principals, it is not clear that all of them would take advantage of these opportunities. In addition, having differentiated groups formed by specific interests for each meeting would make it difficult to develop and sustain the learning community focus of the Network. Perhaps it would be worthwhile to find out whether some subset of new principals, rather than all of them, would like to spend their Network time as part of an unstructured learning community rather than in targeted professional development. While we do not know what would develop out of presenting new principals with these kinds of options, it may be worthwhile to experiment with the form and focus of the Network in order to figure out what configuration benefits most of the district's new principals.

III. C. Mentoring Support. Mentoring provided by experienced BPS principals constituted the third component of the NPSS. The mentoring component was designed to provide new

²⁸We are aware that the BPS will be considering how to better provide and align principal professional development opportunities during the next school year.

principals with regular access to a successful principal who could support them by a) providing school start-up help during the summer of 2004, b) answering their questions and helping them to “trouble-shoot” challenges on an as-needed basis, c) providing “intensive support on key leadership and management issues, e.g. budget development, probable organization, hiring,” and d) conducting monthly “sharing visits” with new principals, designed to target specific areas of interest or need, in new principals’, mentors’, and other BPS schools. Mentors received a stipend as compensation for their work. However, SLI expected that mentors would also derive benefits from their work with new principals, such as the opportunity to reflect on their work and to form connections with other new principals and their mentors. (SLI Document: “New Principal Support System: Mentoring Expectations.” No date.)

SLI involved mentors in a brief orientation in the summer of 2004 followed by three mentor-pair training sessions that took place at the end of the summer, mid-year, and in the late spring. These sessions were jointly organized with the BPF program. In addition, mentors participated in several mentor meetings facilitated by Rachel Curtis and spaced throughout the school year. The meetings were opportunities for mentors to discuss challenges and strategies related to mentoring.

At the orientation, SLI leadership provided mentors with a document outlining key topics of importance to first-year principals. These included a) school culture, b) supervision and evaluation, c) budget/human resources, and d) staffing. (SLI Document: “Important Topics for New Principals: Foci for Mentor-New Principal Partnerships.” No date.) However, although suggested topics were included in this orientation session, mentors had the ability and need to individualize the support they provided in the context of the needs of the first-year principals.

We begin our discussion of the findings related to the mentoring component of the NPSS by acknowledging that during the 2004-2005 school year, mentors devoted a considerable amount of time and energy to supporting the new principals with whom they were paired. Many described making frequent phone calls or visits in order to “check-in” and insure that new principals received the help that they needed. Mentors went to great lengths to make themselves accessible to contact initiated by new principals, as well. For instance, they shared their cell phone numbers and, in several cases, directed their secretaries to put the new principals directly through to them if they called. Mentors logged considerable time answering questions, providing technical assistance, and talking through challenging situations. They made a point of sharing resources with new principals and, at times, helped new principals to connect to other resources in the district and to forge connections with other principal colleagues, as well.

Our data strongly suggest that of the three support components that comprise the NPSS, mentoring provided the greatest level of support and the most useful support to new principals. The effectiveness of mentoring rested upon mentors’ ability to provide targeted, individualized support to the new principals.

New principals recognized and valued this support. More than half of the new principals in our sample described weekly, and sometimes more frequent, contact with their mentors over the

phone, email, or in person. They reported that they depended on their mentors for help in addressing a broad range of challenges, some that were common among them and some that were unique to their schools or their development as leaders.

[It was important] just to have somebody that I knew was really in my corner. If I said, “I don’t understand. Why is this happening? Can you explain it to me?” she would explain it. And to be able to make it through year one knowing that I have her available [was critical]. New Principal I

I love [the mentoring support]. . . . They seem to match people up with people that they knew and felt comfortable with. I could call [my mentor] at home at midnight on a Saturday night and say, “Oh my goodness, I can’t stop thinking about this.” So there’s a level of comfort there, and I feel like she would tell me if she thought that I was doing something that wasn’t right. New Principal C

I think the most important aspect of first year principal support has been for me, the mentoring piece. Whoever did the matching did an awesome job. . . . [My mentor] is really good. I always have good intentions of reaching out and calling, but sometimes I don’t do it. But she will call me or email me or she’ll just stop by, and always at that perfect time where I need her, where I need to say X, Y, and Z. New Principal E

The few remaining new principals in our sample reported that they turned to their mentors less frequently, but utilized them for help to meet specific needs.

I wasn’t worried about the instruction. I was confident about myself as a leader coming in and my commitment to the school, that kind of stuff. I was more interested in looking at the resources and some of those other more technical things that I needed to address. And we’ve been able to touch base on that stuff. New Principal F

I ask [my mentor] a bunch of little technical things, like about the bureaucratic things: how does this work, sort of stuff. She’s always been very helpful. New Principal A

I’m not a novice. I’ve done this before. So my questions for [my mentor] were actually about negotiating bigger things, like my relationship with [my deputy]. New Principal H

Almost all of these principals reported that they had developed relationships with others who served as unofficial mentors and helped to them to meet additional needs.

We turn now to a description of the specific areas in which mentors provided help to the new principals over the course of the 2004-2005 school year.

The focus of mentoring support. A good deal of the support that mentors provided focused on the “nuts-and-bolts” tasks and procedures involved in running a school in this district. These tasks included a) development of the budget, b) staffing, and c) the Whole School Improvement Plan.²⁹ New principals turned to mentors for quick answers to basic questions and for technical assistance to address more complex tasks.

A lot of times, she was really knowledgeable around operational things, so just I’d say, “This time of the year, this is coming up. What do I do? How do I do this?” Or, “I have this problem. Who should I call?” Those kinds of things. Having her only a phone call away all the time just made me feel confident that if there was a question I didn’t know the answer to, I’d know the answer really quickly, because I could always get back something. New Principal G

[I had a question about how I could use funds from a specific grant in my budget. My mentor] was willing to sit down and spend the two hours walking me through each budget line item. I have a clear understanding now. So that was very helpful, and those are the kinds of things you really don’t think about until you’re faced with the dilemma, and then you’re like, “Wow, what do I do? I really don’t know; I don’t have that experience.” And you can just call her. New Principal E

Learning to accomplish these tasks with the support of a mentor gave these new principals confidence. Mastering these basics, we anticipate, will enable principals to devote their attention, in the future, to the complex work of developing the school culture and improving instruction. Moreover, once familiar with the key mechanisms of BPS, they will be better positioned to utilize them in order to meet strategic goals.

Most mentors also made a point of helping principals learn to be strategic about meeting their schools’ goals. They did this in the context of helping the new principals accomplish the major tasks identified above. Some new principals were not quite ready, they reported, to be strategic. They just wanted to finish the work! But others reported that they were able to utilize the support of their mentor to strategically target resources toward their larger goals in the first year. For example, NP Mentor B helped New Principal F to create unique “open postings” for teacher positions that would allow her to hire staff members who would support her vision for the school.³⁰

²⁹SLI categorized the WSIP as a school climate issue in “Important Topics for New Principals.” We include it among the tasks new principals needed to complete because mentors and new principals described the considerable amount of support new principals needed in completing the technical aspects of the WSIP this year.

³⁰In order to distinguish the mentors referred to in this section of the report from those referred to in the BPF section, we refer to New Principal Mentors as NPMentors and give each of them a letter to replace their names in order to maintain confidentiality.

When she was creating the new positions, in order to get the people she wanted, she couldn't just post it as an open X position or Y position because she might get stuck taking somebody else in the system. She had to do something I had experience in, creating unique job descriptions for open posting. She was able to do that. That's one of the things that I did – I went over there and sat down, looked through the jobs. We emailed them back and forth, and she was able to create the descriptions. She got some great people. NPMentor B

Most mentors also helped new principals to address leadership challenges, such as learning how to a) manage their time, b) delegate tasks, c) manage relationships, d) develop a positive school culture, and e) work productively with Deputy Superintendents.

And I realized, talking to my mentor, I want immediate change, quickly. And, he said, "You need to sit down and map it out, three to five years." And, I say, "I can't wait three to five years! It needs to happen now. . . . I don't have three to five years!" I had that conversation with him Thursday, and I sat back and reflected and . . . I just have to take a breath, try to make baby steps. New Principal E

How do you really delegate that, when you know that something needs to get done and you know how to get it done? [How do you] not go and do the work, because you know, if you don't get the work done [you think] then maybe this achievement will fall all around me? Well, it's not going to fall down all around you. But, we talked about, what kinds of things do you have the person doing, what do you see as her strengths? Where are those things where you might have to pick up and do this because if you can then show the different steps, she then can pick that up? And we had those types of conversations. NP Mentor A

I think that she had an ILT where people were pretty opinionated, for example, and she was trying to get them to look at changes, and they were very resistant to any changes that were different from the way the former principal did it. So, because it's a first year, and because of the situation that she came into, we talked about how she could get people to start being more open minded, how she could start the meetings. The little steps to take to get them to that point. . . [A]nd then she called and said, "I tried this and it worked. Not sure where I'll go next time, but I tried it and it works." So she'll get back to me with feedback on the suggestions that I made or decisions that we kind of jointly made together. NP Mentor C

Less often, mentors and new principals focused their conversations directly on instruction. When this happened, a small number of mentoring pairs described discussing issues of curriculum and instruction in the course of their regular "check-ins" or meetings. Most of the conversations related to instruction, however, emerged in relation to school visits because

classroom observations in mentors' and new principals' schools created a natural focus on instruction.

But what I see as I go [into my mentor's school] is how she's organized her classrooms, her teachers. . . . What I saw around the room was consistent throughout the school. . . . Their rooms were very orderly and organized and labeled and very functional, also, for the children who used them. So the materials and work were all available, and they were available to the kids. They didn't have to ask to go to get things. . . . What I saw [in my mentor's school], it's what I am trying to form [in my school]. They are far further ahead than we are, but that's the idea of what I had in mind: classroom libraries and math centers and, what do you call it, reading areas and desks and chairs and groups . . . materials, specific materials just there and available. New Principal B

In some cases, new principals highlighted a challenge they were facing with respect to instructional improvement prior to a school visit and then conducted a site visit with their mentor designed to shed light on that challenge.

She also came in and saw my 4th grade. . . . She felt like her 4th and 5th grade teachers weren't really doing Workshop the way it needed to be done. They were pushing back; they felt the kids weren't capable. And, I have a very strong 4th and 5th grade Workshop model. So, she'd come in, she'd go into classrooms and see them. . . . When she left, she felt like it was very doable, and she wanted her teachers to come and see this class. NP Mentor C

School visits provided an important shared experience that facilitated discussions of instructional challenges and strategies for improvement. However, most mentors reported that they made only one or two school visits that included classroom observations or a learning walk of some kind over the course of the school year. (Other visits included those in which they offered technical assistance, for instance, but did not directly focus on instruction.) New principals made even fewer visits to their mentors' schools because they found it difficult to leave their schools for this purpose. However, many of the new principals in our sample commented on the value site visits could provide.

For one, principals valued the additional perspective their mentors could offer when they observed instruction or other activities in the new principals' schools.

But [it was] just something so simple that she brought to my attention, and I'm in the building every day and I didn't see that. So just having that set of eyes and having that conversation as dialogue. New Principal E

I would say, she was supportive and inspirational, because when she came to the building, she has inspired me. She showed me ways that I could even get greater use out of the building. She showed me spaces that were being underutilized. I

was always saying, “I don’t have a space to do this, I don’t have a space to do...”
– So, having her come and say, “You can do this here and this and this.” New
Principal I

Another principal thought more frequent school visits could help mentoring pairs to develop their relationships. If that happened, mentors would likely be able to provide even more effective support to the new principals, particularly with respect to instruction.

I haven’t seen [my mentor] working as an instructional leader, and I don’t think she’s really seen me working as an instructional leader. I think it would be great for first year principals to go see veteran principals or mentor principals doing professional development or running a staff meeting, so you can kind of get a sense of how they’re doing and maybe they can come and see yours. New
Principal F

Mentors, too, wished they could spend more time in new principals’ schools, but some found it exceedingly difficult make enough time.

I wish I could have more time with her. Also, on evaluations. I cannot go over and sit with her and watch her do evaluations and give her feedback on that. That could be a retired principal who is sitting at home, going in at nine o’clock, sitting through a class and reading the observation. That type of person would have more availability. We’re all tied up. NP Mentor F

While new principals and mentors wanted to organize more school visits – and knew they could benefit from them – most new principals and some mentors reported that they struggled to pull themselves out of their schools in order to make the visits they made.

The challenge of time. Most mentors and new principals reported that the limited time they had to work together remained the greatest challenge to their relationships. Principals and mentors reported that they needed time together in order to 1) get to know one another well so that they could develop trusting and supportive relationships and 2) conduct the actual work of mentoring, including regular conversations and visits to one another’s schools.

Mentors and principals addressed the challenge of time in a number of ways. Many noted that the Mentor Pair Training sessions organized by SLI provided an important opportunity for them to meet together at regular intervals throughout the year. One mentor commented rightly that if these were the only times when they were meeting with new principals, then they were not doing their job. Nonetheless, when added to regular contact, these formal meeting times served as an important opportunity for mentoring pairs to touch base outside of the frenzy of their daily schedules. A few mentors and new principals reported that the structured activities of the Mentor Pair Training sessions contributed to the development of their relationships. Most, however, valued the time set aside to meet more than the specific activities. Mentors reported that they wanted to use the long block of time these sessions provided in order to work with their

partners and focus on the issues that they did not have enough time to discuss in the course of their usual contact.

Mentors and new principals also took advantage of joint membership in Clusters, inquiry groups, and the middle school principals meetings, for example, in order to increase their time together. The pairs who shared such memberships reported meeting together before or after group meetings. Especially for the principals whose schools were at great distance from one another, these meetings served as one of the few opportunities they had to meet.

She's stayed after a couple times at the Cluster meetings, because we're already both out of the building. And when she came, we've done two meetings on budget where she came over, and prior to that, I think, just a general touch-base meeting. NP Mentor D

Some also incorporated their mentoring into these meetings, taking special care to make sure that new principals were connected to and took advantage of resources that the groups offered.

The other piece is that we're in the same Cluster, so we'll always be dealing with one another anyway. Everybody in this Cluster helps one another. We also did some things Cluster-wide. . . to help everybody in the Cluster, in terms of rolling out professional development. We rolled out some for math . . . that New Principal B sent teachers to, as well as myself. Everybody in the Cluster sent their teachers to it. . . . And now we're doing [another professional development opportunity]. I made sure New Principal B knew about those things as well, and she had the option to send her teachers that she felt needed that kind of support. NP Mentor G

I was able to draw her into different phases of the study group . . . and help her develop bonds with some of the other members of the study group team, with principals that she didn't know. . . . And that started us getting to know each other at a different level of collegial rapport, because we're on the same level; we're all principals. Then, I also found that a lot of things that I was involved in, I made sure that she was involved in. And it really helped her out in terms of getting visibility in the district. NP Mentor E

In creating mentoring pairs, SLI leadership had attempted to match mentors and new principals within the same Cluster. Our data suggests that whether mentors and new principals belonged to the same Cluster or to another professional group, these connections tended to support the formation and effectiveness of their relationships.

IV. Conclusions. At the beginning of this section, we stated that SLI faced a challenge in designing a New Principal Support System that would meet the needs of a group whose common characteristic was their *newness* to a position. What we learned was that new principals found the summer Institute and New Principal Network to be of more or less value based on their own

individual strengths and needs and the degree to which the content and format of these components aligned to those strengths and needs. Nonetheless, the majority of new principals in our sample found these support components to be valuable in their first year as principals. And, even those who noted that components did not meet their particular needs reported that they appreciated having supports available. With respect to the summer Institute and New Principal Network, we recommend that the SLI consider the questions and recommendations we have made throughout this section in order to strengthen these components for subsequent groups of new principals, which are likely to be similarly diverse.

Among the three components of the NPSS – the summer Institute, New Principal Network, and mentoring – our data lead us to conclude that new principals found the mentoring component to provide the most targeted and useful support. New principals greatly appreciated having a skilled, veteran principal to turn to as they navigated their first year in challenging school leadership positions. Mentors, for their part, frequently expressed their own wish that such support had been available to them as they began their tenure as school leaders. Comments of this nature, mentors' willingness to share their expertise and devote considerable time to supporting new principals, and new principals' enthusiasm for working with their mentors suggest that this component of the NPSS is succeeding not only in supporting new principals in BPS, but also in supporting professional norms of collaboration and sharing within the district.

THE BOSTON SCHOOL LEADERSHIP INSTITUTE:
2004-2005 EVALUATION REPORT

Section IV
Exploring the Principalship

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IV. EXPLORING THE PRINCIPALSHIP

The Exploring the Principalship Program (EPP) is a nine session professional development program designed to provide interested educators from within and outside of Boston with exposure to the role and responsibilities of the principalship in the BPS. During the 2004-2005 school year, the program consisted of eight two-hour after-school seminars held at the New Boston Pilot Middle School. In addition, EPP participants, in small groups, conducted a site visit to a BPS school to observe school leadership in action.

The two-hour after-school sessions coupled with the site visit were designed to introduce “the principalship to people who have leadership potential and deep knowledge of instruction but have not had school administration experience and may not have considered becoming a principal.” (LeadingLearning, Winter 2005, available at www.bostonsli.org.) Sessions focused on a) the role of the principalship in the district’s improvement efforts, b) school culture and shared leadership, c) instructional leadership, d) leading partnerships with families and the community, e) a case study discussion about school leadership in action, and f) pathways to the principalship. They featured presentations by and discussions with district leaders including the superintendent, deputies, Cluster leaders, and principals and headmasters. In addition to introducing the principalship, the EPP was explicitly designed to market the principalship in Boston so that the district would attract highly qualified educators to its leadership ranks.

Therefore, Education Matters framed its evaluation of the EPP during the 2004-2005 school year around the following broad evaluation question: *How successful is the EPP program in attracting educators with leadership potential to consider the principalship as a future educational role for themselves?* More specifically, we wanted to know:

- To what extent is the SLI recruitment effort effective in drawing a diverse group of instructionally savvy educators into the program? Where, if at all, is the recruitment effort falling short?
- To what extent do EPP participants apply to the BPF program?
- To what extent do these applicants gain admission to the BPF program?
- How and how well does the pedagogy and content of the EPP program foster the kinds of learning desired by the SLI?

In order to provide answers to these questions, Education Matters’ researchers collected qualitative data and analyzed quantitative data on program enrollment. With respect to the qualitative data, we observed four EPP sessions, interviewed eight participants near the end of the program, and reviewed the paper and pencil evaluation surveys completed at the end of each session (N = 174). We also reviewed the responses of three participants to a more detailed survey that was designed to give SLI staff information for a newsletter article on the EPP program, and we interviewed Rachel Curtis, the SLI Director, and Khita Pottinger, the SLI Program Coordinator who organized and facilitated the EPP program. With respect to the quantitative

data, we prepared an analysis of participant characteristics that enabled us to answer questions about who was participating in the program in light of its recruitment goals.

What did we learn from this inquiry?

- The EPP program is achieving its purposes with respect to recruitment. Participants were interested in the principalship, wanted to learn more about its specific parameters in the Boston context, and 15 of the 37 participants, 41% actually applied to the BPF. Three out of eleven of the BPF cohort for the 2005-2006 school year were selected from participants in the EPP. In addition, it seems promising given the EPP's goal of attracting people of color to the principalship that 60% of the BPF applicants were people of color as were two of the three who were admitted to the program.
- Virtually all participants reported that the presenters, particularly principals, both inspired them and greatly informed their view of the principalship. They appreciated hearing the opinions and perspectives of current district-level and school-level leaders. And they were impressed that these leaders were willing to give of their time to reflect on their experiences and answer EPP participant questions.
- Overall, participants found the session topics to be appropriate and helpful in building their understanding of the principalship in Boston.
- Some participants reported that the readings were of considerable importance in adding to their understanding of the principalship. They found the readings to be well-chosen, informational, and inspiring. However, participants felt that the program provided too little time for discussing the readings given their high quality and importance.
- While participants spoke highly of the organization of all of the EPP sessions, they also reported that *time* was sometimes in short supply. They felt that small group discussions sometimes had to be cut short in light of other planned activities, that there was insufficient time for discussing the readings and more small group activities, for example.
- Site visits to schools served as a positive, synthesizing culmination activity for participants in the EPP.
- As a result of the EPP, participants left the workshop series feeling motivated and excited about their futures and with a better understanding of the complexity of the principalship. While not all participants felt ready to take on the principalship immediately, most participants had a clear idea of how to proceed in that direction – whether that meant going back to school, pursuing alternate pathways to the principalship, or continuing to teach for the time being.

In developing these findings, we relied on both the interview sample, the data collected from the narrative survey responses, and the demographic data collected about applicants by the SLI. Although the interview sample included only eight participants, the findings from their data are congruent with the findings from the whole-group survey data.

We now turn to a consideration of EPP recruitment, of who participated in the EPP and the extent to which participants reflected the program’s target population. Then we turn to our findings about how well the pedagogy and content of the EPP seems to have fostered the kinds of learning desired by the SLI.

IV. A. The EPP as a Recruiting Tool for BPS

The Exploring the Principalship Program (EPP) attracted 37 participants in 2004-05. Table 1 summarizes their demographic characteristics and employment status. Most of the participants (89%) came from within BPS, and nearly all worked in schools as teachers or administrators. Five of the participants (14%) were already certified as principals, while another seven (19%) were in the process of obtaining their certification

Demographically, the group was diverse. Less than half of the participants were White (43%), while 41% appeared to be African American, and 16% Latino or Hispanic. There were no Asian-American participants in EPP this year. About half of the group appeared to be over 40 years old; the rest were in their twenties or thirties.³¹

Table 1: 2004-05 EPP Program Participant Characteristics

Race		Gender		Age Range		Certification Status		Job Description		School Level	
African-American	41%	M	38%	20's	14%	Not Certified	59%	Administrative	35%	Elem	38%
Latino/Hispanic	16%	F	62%	30's	24%	In Progress	19%	Classroom	62%	MS	24%
Asian	0%			40 +	49%	Certified	14%	Other	3%	K-8	11%
White	43%			N/A	14%	N/A	8%			HS	11%
										other	14%

Of the 37 participants in EPP in 2004-05, 15 (41%) applied to the Boston Principals Fellows Program, and 3 (8% of total participants; 20% of EPP applicants) were accepted.

³¹Participants did not identify their race or age when participating in the program. The data presented here for those characteristics are based on the information informally available to program staff and directors and therefore should be interpreted with caution.

The 15 EPP participants who applied to the Boston Principal Fellows Program were fairly representative of the EPP participant group, based on their demographic and employment characteristics. (See Table 2) Most came from inside the BPS system, and had been working as classroom teachers or administrators. They spanned in age from their twenties to over forty years old, and were racially diverse. More women applied than men, and most of the EPP applicants to the BPF, all but two, were not already certified as principals.

Of the 15 EPP participants who applied to the Fellows program, BPF accepted three for 2005-06 cohort. Two of the three were people of color; all three were internal candidates (two BPS teachers and one administrator); and all three appeared to be under 40 years old.

Table 2: Characteristics of the 2004-05 EPP Participants who Applied to BPF

Race		Gender		Age Range		Certification Status		Job Description		School Level	
African-American	40%	M	40%	20's	27%	Not Certified	73%	Administrative	33%	Elem	33%
Latino/Hispanic	20%	F	60%	30's	27%	In Progress	7%	Classroom	60%	MS	7%
Asian	0%			40 +	40%	Certified	13%	Other	7%	K-8	20%
White	40%			N/A	7%	N/A	7%			HS	20%
										other	20%

What can we add to these quantitative findings from our qualitative data? Our qualitative interview and survey data lead us to conclude that the program succeeded in recruiting a diverse group of participants who entered the program for a variety of reasons. Some were sure they wanted to become principals while others wanted to learn more about the principalship in Boston before making a commitment to an administrative role. Some were interested in the BPF program as a route to the principalship; others were interested in a range of certification options. Participants joined the EPP program with a variety of goals. As a group, they wanted to:

- Build or enhance their leadership skill set;
- Acquire more information about the principalship and assistant principalship³² to determine if it was the right course of action for them;
- Learn about networking opportunities; and,

³² Many participants in our sample, along with those who responded in the survey expressed an interest not only in principal positions, but in assistant principal (AP) and Director of Instruction (DI) positions as well. This was appropriate given that EPP was designed to provide participants with information about these roles as well as that of the principalship.

- Learn more about the BPF program.³³

Our sampled included participants from within and outside the district. Those from within the district were teachers or certified administrators. These certified administrators, who were working in administrative positions other than the principalship, thought they wanted to become principals in the BPS and participated in the program to learn more about the district's improvement agenda and about what was involved in working in it as a principal. In other words, they sought out the EPP as a way to make more informed decisions about their career paths.

Others in our interview sample participated in the EPP to clarify their thinking about their "next steps" as educators. They were interested in learning more about the principalship as a leadership position, and they participated in the program to learn more about that option as well as other leadership positions, for example Assistant Principalships and Directors of Instruction. A few of the EPP participants with whom we spoke had unsuccessfully applied for principal positions in the district and were interested in learning more about the principalship in the BPS before applying for further positions as this participant notes:

I'm certified as a principal and I have been trying to get into administration for a while. A few years back, I was interviewing. Then, I went back to school so I stopped interviewing. Since I have been out of school, I sent in a few resumes, had a couple of interviews, but I had almost given up even though it is my dream. I thought, I'm not even applying anymore. This is useless. Participant 1

By learning more about the district's emphases and approaches, participants such as this one hoped that they would become more viable candidates for the principalship.

About half of the participants in our interview sample reported that they had joined the EPP not only as a means to learn more about the principalship, but also out of their interest in pursuing administrative certification. Some saw the EPP as a good opportunity to learn more about what the BPS was looking for in principals and alternate routes for achieving the required knowledge and skill.

What I expected to get was an overall view of what the principalship entailed. Because I love what I do, I love teaching. [But] I've always felt that there was more that I could do to empower more children, so I just needed an overall perspective of what it was about. . . . I'm not certified, but it's my intention to go back to school and explore that. Participant 2

³³Interview data as well as survey responses revealed that many EPP participants were initially confused about the connection between the EPP and BPF program. Some thought EPP was a program designed to give participants more information about the BPF program, while others, despite clear descriptions of what the EPP was designed to do, saw it as required step prior to applying to the BPF program.

Others saw the EPP as a stepping stone into the BPF program although, as this participant notes, she learned that the two SLI components are related but unconnected.

When I came into teaching, I had a great mentor, and I carried that relationship. I've been building up [to thinking about the principalship]. I think, when I saw the opportunity to team up with another principal [and have a BPF mentor], I came to this program thinking of [it as part of] the Principal Fellows. I didn't know that these were two separate programs. When I came, they explained to me that these were two separate programs. Participant 3

A Note About Publicity/Recruiting for the EPP. While we do not have survey-based data on this point, participants in the interview sample felt that the EPP was not well-enough publicized within the district and, perhaps, outside of it. While a few participants reported seeing the flyers at their schools, these participants ultimately became interested in the program because someone they knew brought the EPP to their attention. In fact, participants were generally surprised about how few BPS employees partook in the program.

I'm surprised that more people within the system itself weren't a part of it. . . . Just those who, within the system, may be teachers or some other position they hold that might be considering a principalship. I don't know if they have a newsletter or if some other people within the system visit the web site and get the information – I just don't know what kind of promotion they did for it. The class just seemed a little small to me, considering the BPS has, I don't know, maybe some 4,000 teachers and administrators. Participant 4

Indeed, about half of the EPP participants in our sample heard about the program from a respected leader who knew of their interest in the principalship.

And I really sort of jumped on it because of my former principal. She was a great, great principal....I learned so much from her – I kind of grew with her for the five years she was at my school, and I just wanted to follow her, and because [of her], I said it was worth investigating, it was worth looking into. Not knowing where it was going to lead me, just the desire to learn a little bit more, because I kind of aspire to be a leader as she is right now. So that's what got me here. . . . I actually wasn't really trying to pursue the possibility of becoming a principal, I actually love my job and I love where I am and I love what I do, although after going through this program, I'm thinking it might be something I want to do. Participant 5

I have some people, friends that work within the Boston Public School system that thought I should examine the opportunities available as a principal, that would come from a principalship. . . . One particular person, a headmaster at one of the Boston public schools, told me about it and encouraged me to participate, just to get a general understanding of the principalship. Participant 4

Well, to tell the truth I never quite heard anything of it. A flyer came out, or maybe it was when they advertised on MyBPS. My principal printed out the flyer and gave that to me, because I guess she must have seen a leader in me and she knew that I'd like to have my own school some day. She encouraged me to go to find out more about it. Participant 2

Without question, it is productive to engage current BPS administrators in identifying members of their faculties and others who may be good candidates for the EPP. To the extent that the EPP wants to attract more participants than it had in the 2004-2005 school year, however, it may be beneficial for program leaders to consider additional strategies for making knowledge of the program more widely available.

Given these quantitative and qualitative findings, it certainly appears that the EPP program is achieving its purposes with respect to recruitment. Participants were interested in the principalship, wanted to learn more about its specific parameters in the Boston context, and 15 of the 37 participants, 41% actually applied to the BPF. Three out of eleven of the BPF cohort for the 2005-2006 school year were selected from participants in the EPP. In addition, it seems promising given the EPP's goals that 60% of the BPF applicants were people of color as were two of the three who were admitted to the program.

IV. B. EPP: Design and Implementation

It is important to begin by stating that EPP participants found the program to be a valuable and inspiring experience. While participants had varied experiential and demographic characteristics as well as a range of reasons for participating, they all regarded highly the opportunities to learn provided by the program. No one in the interview or survey sample reported that the EPP wasted their time. By the end of the program, many participants had determined that they would seek to become principals. Those who were not sure, or who thought they would remain in their current positions, reported that they had more regard for and understanding of the role of the principal than when they began the EPP. We turn next to an elaboration of the qualitative findings about the content and pedagogy of the EPP.

1. Virtually all participants reported that the presenters, particularly principals, both inspired them and greatly informed their view of the principalship. Participants appreciated the opinions and perspectives of district-level and school-level leaders who brought direct experience from the district to the EPP sessions. They appreciated that these leaders were willing to give their time to reflect on their experiences and answer EPP participant questions.

EPP participants were especially pleased and excited by the principals and headmasters who spoke to them. They felt that they received practical advice and developed realistic job expectations from principals and headmasters during these sessions. Many participants remarked that they were, indeed, inspired by these leaders. While a few participants noted that question and answer sessions were sometimes too long, most participants did not tire of listening to the

principals' and headmasters' stories. On their survey forms, many participants wrote that they would like to hear from more principals, particularly those at the middle and high school levels. The following comments were made by participants in our interview sample:

The presentations were good opportunities, not just to get information, but also to meet the people who are in the roles and to see the kind of struggles they have and to hear about their stories and their experiences. I think that was very, very valuable. Because if I'm now going to consider a principalship, who are the players, and what roles do they play? Participant 5

It was both informative and motivational. It's very nice to see people in front talking about things when you feel the same way, so it was reinforcing. Participant 3

I thought [the presenters] were excellent, because I could identify or not identify with particular individuals, things they said, their backgrounds, and they had first-hand experience. I thought the selection of the individuals was really top notch. They were very passionate, people who were very straightforward and had had experiences they were willing to share. I was also impressed with the fact that [the program's leadership had] identified presenters with a particular unit of expertise, and they shared that particular piece of expertise. We were able to see the depth and breadth of what could potentially take place. And we were given a very realistic dose of what this job entails, and so we could then identify our own strengths and weaknesses and say, "That works for me, that doesn't work for me, a piece of this works for me, I can identify with this." I really appreciated the speakers. Participant 6

Participants found the district-level administrators (i.e., the superintendent and deputies) inspirational as well. They felt that these speakers gave a helpful overview of district's goals and painted a realistic picture of the role of a school leader in the district. Survey responses also indicated that participants respected and valued what they perceived as the district administrators' honesty and willingness to openly respond to questions.

The superintendent's session was very informative, very helpful. That was probably one of the most inspiring sessions for me. Participant 7

We had Dr. Payzant, and we had the deputy superintendents. I thought that was very valuable, that they came in and talked with us. Dr. Payzant talked about the six Essentials. And he talked about what he expected from the principals, and the support that would be there. And the deputies talked about their different experiences. Dr. Williams spoke about how she was a principal. They all shared their different experiences, and we learned. I know I learned what they expect when they come to a school, and what they're looking for, and how the six

Essentials guide instruction, and are used to grade the school and so forth.
Participant 2

Even asking him [Dr. Payzant] hard questions without a clear-cut answer, you could see his vision and see his plans for his role. Participant 8

I loved Sid Smith, when he came in with the steps: just think about what you're going to do and plan as much as you can, but always be open to all the priorities that start stacking up at your table, because obviously there are many priorities, on a daily basis, that you cannot prevent. They just come and you've got to take care of it. But, he says, the more you plan, the better off the outcome. Participant 7

EPP participants who were teachers took comfort from the knowledge that many of the speakers had started out as classroom teachers. This reinforced to participants the fact that they, too, could gain access to leadership positions from their current position.

It wasn't like the superintendent gave a lecture. He talked some, he told us about his experiences. Sometimes you look at these people and they're up there and [you think] they didn't have to go through what I'm going through. But, he wasn't always the superintendent. He started out as a teacher like many of us did. So, it was good to be able to see people [who were] just like you and they are [now] in the position that they are in. Participant 1

As a result of the various presentations, EPP participants noted on their survey forms that they wanted to follow up with presenters and determine whether they could become involved in the presenters' initiatives. Participants also wanted to know where to go to learn more about topics discussed by speakers, for example, community involvement or using data. On survey after survey they requested that the EPP provide them with a list of resources, websites, books, etc. that were related to the topics of each session in the event that they wanted to learn more about the topic. This feedback strongly suggests that the presentations were stimulating, informative and served the purpose of sparking participants' interest in leadership positions in the BPS. From our perspective, these findings also point to the positive impact of the program on participants desire to learn more about leadership and how leadership and district initiatives were tied to their current work in schools.

The SLI leadership suggested that none of the presenters "sugar-coated" their comments to the EPP participants. And, indeed, principals and district administrators did highlight challenges that they had faced either in leading schools or in supporting and holding school leaders accountable. For example, Deputy Superintendent Janet Williams described the challenging school-based conditions that new principals may encounter:

Many times, many new Principals walk into schools where the culture/climate is toxic. As a new principal you have aspirations of going in and running the school

– but the culture/climate is imbedded. To do what you have aspirations to do, you need to change that culture/climate and that’s not easy to do. When you’re dealing with behaviors, especially with veterans [teachers], they’ll sit and listen, but they’re saying “Oh Yeah.” You need to develop strategies for changing behaviors. You set the tone.

Later in her discussion she spoke about the loneliness that can accompany working as a principal when she said:

The job of principal is a lonely job. You have no friends. Seriously. I say that because when you make decisions and you make the wrong decision, no one has your back. If there is someone back there, they’re just smiling.

In the same vein, one of the principals spoke about the confrontational faculty culture he faced as a new principal and another spoke about the importance of changing adult expectations around school culture and climate.

However, for the most part, these administrators spoke of how they successfully changed the culture and climate in their schools, giving the impression to the participants, that principals needed only the right tools and attitudes to make needed changes. To the experienced practitioners attending the EPP, these presentations had an aura of over-simplifying the complexity of leading change in difficult schools. They wanted to hear from principals who were still struggling with these kinds of issues. Some wanted to hear about intractable problems or district policies that complicated principals’ work.

It is not surprising that in a program focused on not only providing information about the principalship, but on “marketing” the principalship in the BPS, most of the presentations focused heavily on successes – how a principal overcame specific challenges. Still, it may be valuable in future iterations of the EPP to focus a small amount of attention on such challenges and have principals who face them talk about what motivates them to continue to lead schools in the BPS.

2. Overall, participants found the session topics to be appropriate, and to be helpful in building their understanding of the principalship in Boston. Many participants noted that the sessions built on each other in that, for example, the principals’ perspectives reinforced the superintendent’s vision and the sequence of the presentations allowed them to identify themes and skills that would help them become better leaders.

For example, participants reported that by being exposed to the different aspects of the principalship, they were able to reflect on their own characteristics and how well suited they were for the position. They reported that the content of the various sessions broadened their understanding of the principalship and the breadth of work the position entailed. Initially, some participants said that they thought the role of the principal involved, primarily, scheduling and managing the school. They learned, however, from multiple presentations and discussions, that in the BPS, the principalship does not focus primarily on what would be called management. The

SLI Program Coordinator pointed out that, by design, the EPP focused on instructional leadership rather than on operations given the district's emphasis on improving teaching and learning.

I initially thought that the principalship was about managing a building and scheduling. I knew it had some instruction in it. As I went through the program I saw that it was definitely geared toward curriculum and instruction. Participant 8

Looking at the characteristics of the principal and looking at the dimensions of the job [were valuable]. And that allowed me to reflect and in that reflection, in looking outwards and looking inwards, to see what I have and what I need. And that built up my confidence to apply to the BPF program. I saw elements of what I have and what I have to develop. I think the sequence of the presentations allowed me to see the broad scope of accountability and a lot of subjects that were really enlightening. Participant 3

I knew from my experience as a student that the principal was the boss, that's pretty much it. . . . I've had an opportunity to broaden my scope about what a principal does, having the site visit, that experience in and of itself was immeasurable [in value]. Participant 4

I guess for me when the administrators really talked about the leadership pieces, that was really important for me and really I think critical or crucial or whatever. I enjoyed every session and thought every session was great. Participant 1

Some participants were particularly taken with the aspect of leadership that related to the topics of school climate and building relationships with adults. They recognized how difficult, yet important this was if one were to be successful leader.

I have to learn to build a relationship with other adults so as we're working together with our children in a certain climate, that there is some sort of positiveness, some sense of achievement. And that's a challenge. I got a little of that – I got some good information from these sessions about that, and if I had to say, where am I right now as a professional, that's the thing that gnaws at me, that's the thing that says, do you really want to do this? Participant 5

The headmaster at the school we visited encouraged his staff to have input about the direction that the school was going, and I consider myself to be that same kind of a manager. If I'm managing a business, I need to know what's working in the business and what's not working in the business and how to go about changing it, and that kind of feedback can only come from the people that work with me. He was real good about that, about having them interject their opinions about how to make the school run more efficiently. Participant 4

For someone [like me] who has not had any type of experience or any perspective on what this is all about, I think it will be important to read about the culture, how to sustain a culture of shared leadership – those are the key components of running an effective school. Participant 2

In Boston, it is crucial for principals to understand the district's focus on, among other things, instructional leadership, distributed leadership, and a positive school climate and culture. Given these participants' comments coupled with those on the surveys, it appears that the EPP presentations made especially clear the district's expectations in these areas for those in leadership positions.

3. Some participants reported that the readings were of considerable importance in adding to their understanding of the principalship. They found the readings to be well-chosen, informational, and inspiring. These participants felt that the program provided too little time, however, for discussing the readings given their high quality and importance.

The reading in itself is great, because the readings gave me more information than the presentation in itself. I found the reading was provocative, but if you really engage in it, you come out with another question, and if they don't provide the time for you to ask those questions, there's a level of frustration. Participant 3

The part that I enjoyed the most were the readings. The readings were extraordinary, because they brought us to the next level, they made us reflect in terms of what we were doing in the school level, and I even shared some of my readings with my colleagues as a school. . . . [They] were incredibly inspiring and were really helpful because they validated the work that we do at the school, validated what we're learning in terms of the CCL, in terms of the new educational system Boston has, which I really, really support. Participant 7

They applied perfectly. They were not just new, but validated [your thinking] or brought awareness of an issue you didn't think of. They brought it home. The readings were right on. Participant 8

The EPP participants particularly enjoyed reading the case study and participating in the subsequent discussion led by the elementary school principal about whom it was written. Survey and interview responses indicated that they valued the opportunity to meet the principal and listen to her speak about issues related to her first year as a principal and her leadership style.

The case study I took real close to heart. . . . It touched on urban education and the struggling school that the newly assigned principal faced, and how she, in a short period of time, brought some good and positive results out of the school. And that kind of lets you know that it is possible. It's possible to bring some good results if you have a good staff and a plan and some resources at your disposal. . . . [Case studies] kind of give you a real hard-nosed approach to what

some people were exposed to and the limited resources that were available to them, but that they could end up making their schools somewhat model schools in a particular system. Participant 4

Because they valued the readings, many participants in our interview sample and in survey responses commented on feeling frustrated by the fact that many times the readings were not incorporated directly into many of the sessions. And, although it is likely that some participants gained a great deal from doing the readings on their own, it is also likely that they would have gained more had the readings been used explicitly used during more of the sessions.

They were all really excellent readings. We had one session where we did discuss the readings, but for the most part we didn't discuss the readings as such, they were all adjuncts. Participant 6

I think the discussion is key, because you had your own theme and you interpreted it, and other people had their own way of seeing it as well. So, if we came together and discussed it we [would] have a broader perspective of, "OK, I understand how you see it this way and I see it that way." We would communicate with one another as students, we would gain a better understanding of the readings that way when we work as a group, when we discuss it. . . . I would say there were very few [opportunities to discuss the readings]. Participant 2

While we recognize the value of the readings and some participants' desire to allocate more time for discussing them, we also recognize the challenge facing the EPP as it tries to balance the time available for the program with the priorities for participants' learning. We will return to this issue as it relates to the readings and other program components in the "conclusion" section of the report. We turn, next, to other issues related to time as well as to the organization of activities within EPP sessions.

4. While participants spoke highly of the organization of all of the EPP sessions, they also reported that *time* was sometimes in short supply. They felt that discussions sometimes had to be cut short in light of other planned activities, that there was insufficient time for discussing the readings, for more small group activities, and, as a result, for participants to get to know one another.

Participants in our interview sample and in surveys responses frequently mentioned the issue of time with respect to the EPP sessions. On the one hand, participants noted that they left the sessions with significant questions that had arisen from the sessions and, as a result, were sometimes frustrated that they had not had an opportunity to elicit answers for those questions. As noted above, some participants wanted more time to discuss the readings, and, some participants also wished for more time for reflection activities. In this sense, the program accomplished the goal of a) engaging participants in learning about the principalship in BPS and,

b) provoking participants to raise additional questions and considerations about leadership and the principalship position in Boston.

However, on the other hand, time was an issue in most of the sessions partly because the agendas included more components than likely could be completed in the two hours available. In addition, the facilitator of most of the sessions made frequent references to time and the need to move through or cut activities in order to finish on time. Participants reported that they found these reminders distracting. They were frustrated when conversations had to be stopped abruptly as a result of time limits. From time to time, supplemental, small-group activities were removed from the agenda during sessions.

In contrast, participants also noted that some question-and-answer periods went on for too long or were organized in a format that was less helpful for them. Survey respondents noted that they wished some of their colleague participants would be more understanding of time and others in the group and focus their questions and comments more succinctly. Several noted that had question-and-answer sessions been conducted in smaller groups they would have had more opportunities to ask the questions that mattered most to them. This may not have been feasible, however, in some of the sessions that involved administrator presentations.

Within the time allotted for them, participants reported that they valued the small group work. They noted that it provided time for them to interact and learn from other participants, to have more of a voice in the discussion. It provided an alternative learning environment.

[When] we were in here and we broke down into a small group, it was nice, too. I just remember [the small group work] being an opportunity to not be in a big crowd, and also to be able to express some of the ideas and things that are running around your head. . . . It was a break from sitting in a big group. Participant 5

We would break up into small groups and do [different activities]. . . . We would either discuss articles we read or we would discuss something that was said in one of the sessions and respond to it. It was good to talk about reflections that had been done over the course of the week. Participant 1

I thought [the small group work] was very good, because we all come from different backgrounds and we have different things that we bring here - so it was a wonderful learning experience. We learned from each other. Participant 2

Participants noted both in survey responses and during interviews that they enjoyed the small group work. They also recognized that the Program Coordinator responded to their requests for

more small group work when possible. Nonetheless, participants felt that they would have benefitted from more small group activities that enabled them to discuss topics more deeply.³⁴

The Program Coordinator was keenly aware of the issues of time and the challenge posed by needing to “cover” the curriculum for a group of diverse learners while wanting participants to go deeply into some of the content and issues. She was fully aware of the way in which participants were “pulled” from their conversations in order to attend to the next items on the agenda.

I think just as folks start to get into it, we have to pull back and move along. And I think if they were given a little bit more time, they would again be able to plumb the issues more themselves. And, these are people who won't see each other again until the next session, so the conversation's not going to continue [outside of the EPP context] because they don't connect with each other [anywhere else].
SLI Program Coordinator

Participants raised one other issue that may be related to time: they regretted that they did not have opportunities to get to know the others in the group. They concluded that the EPP attracted interesting individuals with a variety of experiences and would have liked the opportunity to get to know and learn from the others in the program. Indeed, one important reason for small group discussions was the opportunity it would afford participants to learn about and from one another.

They had opportunities to talk with people at different levels; somebody who has taken on substantial leadership opportunities at the school that helped him think about some things a little differently than say, a 3rd or 4th or 5th year teacher would. Also, [to learn about] variations in setting that are important for folks to know about a school. [For example] with Roxbury or Allston-Brighton, there might have some very different issues around school culture and climate than [other] schools...or a school that serves kids with special needs. So [small groups were for] having them think about the complexities of how this looks different in different settings. SLI Program Coordinator

Participants indicated that they would value that opportunity to learn more from colleagues who worked in different schools and settings.

I'm wondering if something could be built in where relationships were developed, because while the exposure to the folks who spoke to us was excellent in terms of networking, I didn't get to know the individuals in the larger group. So if some mechanism could have been built in – we were faces and we were cordial to one

³⁴Participants expressed mixed reactions to using program time to reflect on their learning. While some noted positive aspects of reflection time, such as organizing and drilling down on helpful aspects of the sessions, others felt that the time could have been more usefully allotted to other activities with reflection left to the individuals.

another and we shared, sometimes, in whatever discussions we had, but that was minimal. Participant 6

The EPP did try to help participants get to know one another. Participants were asked to verbally introduce themselves during small group time on the first day of the program, but some individuals spoke so quietly they could not be heard. Name tags were written with regular pens and, as a result, participants and the facilitators of the small groups had difficulty reading them. There were few opportunities for introductions after the first day although, as in any group, those who spoke most often became known to the others.

Certainly, it would have taken more time to provide better opportunities for participants to get to know one another. However, they likely would have benefitted from introducing themselves to one another during the first few small group sessions. Such a process would have created a greater sense of “groupness” or cohort for those in the program. And, it might have enabled them to build and sustain a network of relationships when the EPP ended.

In raising the issue of time, we want to note that participants raised it in the context of a program that they valued and about which they had very positive reactions. Because they were so engaged much of the time, they often felt they lacked opportunities to satisfactorily conclude their discussions and reflections before moving on to other topics and activities. Because the group of participants was diverse with respect to professional experience, they asked questions that reflected these differences and, as a result, likely took more time than if the group had included, for example, only participants who were teachers or Assistant Principals.

After two iterations of the EPP, it may be worthwhile for the SLI leadership to review the goals of the EPP in order to confirm its clear priorities with respect to its content and pedagogy. With the goals and priorities in mind, it may be possible to make decisions about the need to lengthen the program during the 2005-2006 school year in order reduce the challenges posed by limited time. Or, if the decision is not to lengthen the program, it may be possible to identify one or two topics that could be offered in optional program sessions.

5. Site visits to schools served as a positive, synthesizing culmination activity for participants in the EPP. The site visits were designed to enable EPP participants to take what they were learning in the program sessions and witness it in action in district schools. The program leaders created the site visit groups by asking participants what level they wanted to visit. Then, based on what they knew about the participants from the EPP sessions, they formed groups that they thought would bring together people with different skill sets and backgrounds but who shared an interest in a particular level of schooling.

Groups visited the schools and then, in space available at the school, if they chose, they worked on responding to a set of questions developed by the SLI leadership. Fundamentally, the set of questions asked participants to summarize their visit, identify their key learnings about instructional leadership in that school, decide what each member of the group wanted to share

with the entire EPP cohort, and consider how what they learned from the site visit meshed or did not mesh with the content covered in the EPP sessions.

As participants noted in their survey and interview responses, the site visits accomplished their purpose; they were a capstone experience.

[The site visit] was pretty much the creme de la creme. It was great that it came toward the end. At the beginning it would have had less impact. Even for those people in the group who were APs, there was some information they didn't know. [If the site visit had taken place] at the beginning, they wouldn't have had good insight. When the headmaster came in, he was great. Being only four people, we were able to ask so many questions in a 40 minute time frame. Being able to walk in his building, you could see if the vision was acted out. Participant 8

I'm grateful for the experience I had in the EPP program. I'm committed to following this track now. The site visit kind of put the seal of approval on it for me. I would like to do the BPF only because I'm from the Boston school system, this is my community, my city. There's a personal sense of commitment to it as well as professional. Participant 4

I think the most impactful [experience] was the school visit. I think there should have been more of them. It's one thing to read it, but when you actually see it in action, it's a totally different story. Participant 2

I was thinking that I really did find that visit to the school really helpful, beneficial. I don't know if there is any way to give more of that. I left there feeling, "Oh, man, I wish I could go back again." Just seeing, actually seeing what we had been hearing about and seeing it put into practice. Participant 1

Because the site visits were so powerful and enabled participants to "put into perspective all that they learned from the workshops," participants suggested that the EPP have at least two of them in future sessions.³⁵

After the site visits, many participants, particularly those not currently teaching, realized that they would have liked more time to visit additional classrooms. Most participants, and especially those who had more familiarity with classroom practice in the BPS, suggested that they wanted to spend additional time with the principal rather than visit classrooms. Virtually all of the survey responses, in fact, included comments about the participants having wanted more time with the principal and, indeed, several participants indicated that they would like to shadow the principal in order to "get a better picture about the job of an instructional leader in action."

³⁵In fact, based on feedback from the first year of the program, the SLI Program Coordinator had planned for participants to complete two site visits. One had to be cancelled, however, due to the large number of snow days that occurred during the winter of 2004-2005.

Some participants would have liked the opportunity to observe CCL professional development time or other venues where teachers were engaged in instructional work with colleagues. Still others would have liked to talk to teachers during the site visits. And, a small number of participants wanted time to meet with other key administrators, for example Directors of Instruction and Assistant Principals.

These findings, which demonstrate the extent and depth of EPP participants' eagerness to learn, strongly suggest that the program recruited an appropriate group of educators who were genuinely interested in leadership in the BPS and eager to take advantage of the learning opportunities provided by the program. Participants felt that the site visit, as a culminating activity for the program, tied together the series of sessions and enabled them to see how they look in actual practice. Indeed, they wanted additional learning opportunities and, we suspect from the data, would have relished the chance to spend considerably more time observing leadership practices in a number of schools.

While the EPP, given its goals and scope, could never provide all of the learning opportunities these participants desired, as a recruitment tool, the program certainly "whetted" their appetites for further considering school leadership positions in the district.

IV. C. Conclusions and Recommendations

The evaluation of the EPP component of the SLI was designed to answer the broad evaluation question: *How successful is the EPP program in attracting educators with leadership potential to consider the principalship as a future educational role for themselves?* With respect to the sub-questions related to recruitment, we concluded that the EPP was successful with respect to recruiting a diverse group of potential principal candidates, many of whom became more interested in the principalship as a result of participating in the EPP and 15 of whom applied to the BPF component of the SLI.

Now, we turn to our conclusions regarding the qualitative evaluation question: *How and how well does the pedagogy and content of the EPP program foster the kinds of learning desired by the SLI?* Our data lead us to conclude that the EPP program, as designed and implemented, indeed fostered the kind of learning desired by the SLI. By this we mean that participants left the EPP with a) more knowledge of district priorities and policies, b) greater acquaintance with district- and school-level leaders, c) more knowledge of the principalship in the BPS, and d) greater insight into their own futures with respect to becoming principals in the BPS.

Specifically, participants left the workshop series feeling motivated and optimistic about their futures and with a better understanding of the complexity of the principalship. While not all participants felt immediately ready to pursue the principalship, most participants had a clear idea of how to proceed in that direction, whether that meant going back to school, pursuing alternate pathways to the principalship, or continuing to teach for the time being.

Participants reported that the program added a great deal to their knowledge and understanding of the principalship. First, they realized “how incredibly complex it can be.” Participants felt that they had a “clearer understanding of the typical day of a principal” and the “high level of energy and commitment” required by the position. One participant wrote in his/her final survey, “a principal must be informed, flexible, a magician, a jack of all trade, and a true believer in the system and his or her dream to make it. Oh, and a workaholic!” Participants left the EPP with a greater appreciation for the role and responsibilities of the principal.

I would like to thank whoever designed the program, because we talk about professional development, creating the setting for these things to happen, and really allowing teachers or administrators or the personnel to know what’s ahead and what’s there. Even if I never become a principal, I would respect principals more, and become a better teacher, because I know more about the work, and I think that’s already helped me a lot. Participant 3

Second, participants felt that they learned about effective leadership and different leadership styles through the panel discussions and site visits. Participants noticed that principals had flexibility within the district’s Essentials to develop and articulate their unique leadership: “the ability of each principal to ‘design’ his/her own school based on their beliefs within the BPS frameworks and Essentials,” as one respondent put it. However, some participants commented that while they did not know if it was feasible, they were interested in hearing from principals who were struggling in their positions. They felt that hearing those experiences would give them a more realistic understanding of the principalship.

Third, some participants felt that they were better able to understand district priorities because of the early EPP sessions with the superintendents, deputies, and Cluster leaders. They found this helpful in understanding their own work and place within the district: “[The sessions gave me a] more detailed and in-depth look at the six Essentials and how that looks in terms of a leadership role.” Additionally, they felt that the knowledge they gained from these sessions would position them well for future work.

EPP helped participants clarify their own thinking with respect to their own ideas about future plans. Many participants reported that the program confirmed their desire to be a principal. Those participants who were already certified indicated that they felt ready, after EPP, to apply for principal positions. As one participant stated: “I feel ready to put into practice the knowledge and experience that I’ve acquired over these years.” Participant 7

I feel like this would be the ideal time, because I have spent a lot of time accomplishing [another] goal, and now [becoming a principal] will be incredibly satisfying, knowing that I will have all the time to put in and practice the skills, the knowledge, and use my background in helping schools to really reach the goals, of making sure that all the students achieve at their highest level, and that teachers and administrators work together to achieve that goal. Participant 7

I am seriously considering it,...and this is the time, and this is the place....I would very much like to. I love being an administrator. I love being back in Boston. I'm really pleased to see all the support networks that are in place, and I feel that I would be an excellent administrator. I need to make the decision for myself, looking at my own personal issues, but this has certainly been an excellent framework to jump off of. Participant 6

Many of the participants who were teachers or came from outside of the educational system were not sure that they were ready for the principalship, but they did not reject the option. Rather, they reported leaving the program better informed about how to go about strengthening their knowledge and skill base. Several thought they would either apply to principal training programs or take on more site-based leadership roles in order to strengthen their applications. As we know, 15 of the EPP participants did apply to the BPF program. A very small group of participants, after reflecting on their careers while in the EPP, determined that they enjoyed their current roles and would continue with them. As one survey respondent wrote:

[The EPP] forced me to evaluate my perspective, my goals, and my true desires. I realize that I love my life, I love what I do and am able to do. I don't need to change at this particular time.

From our perspective, these data strongly confirm the conclusion that the pedagogy and content of the EPP fostered the kind of learning – content knowledge as well as reflection – that the SLI wanted to achieve. Therefore, we turn to a small set of recommendations that arose from the analysis and offer them in the context of a program that is fundamentally sound.

Recommendations

- ***Keep the basic program content, focus, and pedagogy.*** Participants learned a great deal from the mix of presentations, reading, discussions, and site visits. As planned, implement the next iteration of the program with two site visit opportunities for each participant.
- ***Consider, in light of EPP participant comments, whether it would be valuable for participants to hear from additional competent principals who are struggling currently with instructional and/or school culture and climate issues.*** Such a discussion would not diminish EPP participants' interest in the principalship. Rather, it would serve to bring them into the conversation about the hard work that remains to be done in the BPS context where policies and practices are designed to support school-based leadership. To this end, perhaps it would be good for EPP participants to hear from additional first-year principals.
- ***Consider the EPP goals and priorities in order to determine how to reduce the number of activities planned for each session so that participants have sufficient time to discuss and reflect on what they are learning. If necessary and feasible, add one or two***

sessions to the program. In making this recommendation, we strongly suggest that the EPP syllabus continue to include ample time for small group discussions about the presentations and readings. Given that it will not be possible or necessary to discuss all of the readings, the EPP leadership might designate some readings as background and/or for individual learning, while others are designated for discussion in small or large groups. By doing this, the program can set clear expectations for itself concerning the readings and make those expectations transparent to the participants.

If the program leadership is concerned that there may be too little planned for some sessions, that some activities might fall flat or take less time than anticipated, the facilitator can be prepared with back-up plans and activities. These might include, for example, items that were removed from the syllabus in order to provide more time for small group work.

- ***Provide formal opportunities for participants to get to know one another in the EPP context.*** The educators who have chosen to learn in the EPP have the potential to form associations/networks that will carry them through their changing career paths within the district. For this reason, it would be worthwhile for the program to help them form relationships. In addition, it can be quite uncomfortable for participants to attend the EPP over a series of weeks without being certain of the names and/or positions of others in the group.

It would not be difficult or terribly time-consuming to create such opportunities. At the simplest level, the program could provide markers for writing on name tags so they could be read easily from a distance. In addition, the program could ask each EPP applicant to write a four sentence BPS/career related biography that would be shared with all other EPP participants. In addition, each time that new small groups are configured, participants could be asked to introduce themselves.

- ***Consider how to provide EPP participants with access to resources related to the content of the sessions and further steps toward the principalship.*** Survey and interview data make clear that participants wanted to know how to learn more about topics discussed by speakers, for example, community involvement or using data. They suggested that the EPP might provide them with, for example, a list of resources, websites, books, etc. that were related to the topics of each session in the event that they wanted to learn more about the topic. In addition, many participants were eager for information about how to apply for principal positions including information about how to create a strong application. Others who were interested in pursuing the BPF had hoped for more information about the application process.

It may not be possible for the EPP to respond to all of these requests for resources. However, given the high level of interest participants have in leadership in the BPS, we think it would be worthwhile for the program to consider how it can reasonably respond to some of these requests.

Those who participated in the EPP began it with an interest in serving children who attend the BPS. They concluded the program with much more knowledge of the principalship in Boston as well as of the district's priorities and policies. The EPP recruited educators interested in leadership positions, guided them to learn more about leadership in the BPS, and convinced many that it would be worthwhile and feasible to develop and/or make use of the leadership skill they had by committing themselves to become principals or other leaders in the school system. Our analysis leads us to conclude that the EPP was a thoughtfully designed and well-implemented program that achieved its goals.

V. NEXT STEPS

The Boston School Leadership Institute is a bold, complicated, well-developed effort to provide the Boston Public Schools with high quality new principals who are knowledgeable about the district's Whole-School Improvement agenda and committed to working in this urban district. To this end, the SLI was designed to a) interest potential leaders in exploring the principalship through participation in the EPP, b) prepare several cohorts of new principals through the BPF program, and then c) support them and other new principals through the NPSS. The Boston SLI has received national recognition for its design and implementation.

Our evaluation of its implementation and impact during the 2004-2005 school year leads us to conclude that each component of the program has considerable strengths as well as areas that could benefit from some redesign. This is to be expected from a complicated endeavor that just concluded its second year. As we noted throughout the report, prior to our concluding this evaluation report, the program leaders were already making improvements to its design. This bodes well for the future of the program and for the BPS.

Education Matters looks forward to continuing its evaluation work with the goal of providing the SLI with usable information that can contribute to the quality of leadership in the BPS. Toward that end, in collaboration with the program's Executive Director, we have developed an evaluation design and workplan for the 2005-2006 school year. This workplan reflects the overall set of evaluation questions and responds to what we learned in Year I. It is designed to build the SLI's knowledge base about the links between the BPF program, the NPSS, and the success of principals new to Boston by focusing on a set of the new principals included in our 2004-2005 study as well as a sample of the Fellows who we studied during their residency year.

We look forward to beginning this work and helping to support the development of school-based leadership in the BPS.

Appendix A: Evaluation Questions

Evaluation Questions. The SLI has three independent and yet connected components, each of which requires evaluation attention. Therefore, we developed one broad question for each component as well as a set of sub-questions that to enable the reader to understand how we are thinking of the important features of each Institute component.

1. *How successful is the EPP program in attracting educators with leadership potential to consider the principalship as a future educational role for themselves?* More specifically:

- To what extent is the SLI's recruitment effort effective in drawing a diverse group of instructionally savvy educators into the program? Where, if at all, is the recruitment effort falling short?
- How and how well does the pedagogy and content of the EPP program foster the kinds of learning desired by the SLI?
- To what extent do EPP participants apply to the BPF program?
- To what extent do these applicants gain admission to the BPF program?

2. *How successful is the BPF in meeting its goals of providing the BPS with new principals who have the knowledge and skill needed to be effective in their work?* More specifically:

- To what extent is the SLI's recruitment effort drawing a diverse, instructionally knowledgeable group of educators into BPF component of the Institute?
- How and how well does the program's design and implementation foster the kinds of learning desired by the SLI?
 - How does the coursework contribute to Fellows' knowledge and skill with respect to instructional leadership, community leadership, and systems management?
 - How do the mentor relationships and year-long school-based learning opportunities contribute to Fellows' learning?
- How successful are the Fellows in meeting and completing the program's requirements in light of the eleven competency areas identified in the Proposed Evaluation Design?
- How successful is the district in placing BPF graduates in leadership positions?

3. *How effective is the district in supporting and nurturing first- and second-year principals from the BPF program and elsewhere so that they are successful ?* More specifically,

- To what extent do the supports address key challenges that new principals face?
- To what extent is the NPSS successful in creating a cadre of new principals who form a learning community among themselves and with more experienced principals? How successful is the BPS in keeping effective new principals, whether BPF graduates or not, in the district for at least three years? For more than three years?
- Over time, to what extent do these new principals become leaders in the district by becoming Cluster leaders or taking on other significant leadership roles?
- To what extent do these new principals lead their schools to accomplish or move toward accomplishing the outcomes described on page 3 of the SLI Proposed Evaluation Design?