

STRATEGIC MANAGEMENT OF HUMAN CAPITAL IN THE LONG BEACH UNIFIED SCHOOL DISTRICT

A Case Study

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This study of strategic management of human capital in the Long Beach Unified School District is one of a series of case studies of urban districts that comprise the Strategic Management of Human Capital Project. Study data were obtained by review of extant written documents and interviews with high-level district administrative staff. A caveat: With the exception of a brief conversation with the President of the Teachers Association of Long Beach (the collective bargaining agent for teachers in the district), interview data and accompanying analyses reflect the views of Long Beach central office administrators.

Following an introductory context-setting section, this case study is organized into several major sections: 1) acquiring talent—recruiting, selecting, and placing teachers and administrators; 2) talent management, development, and retention—induction, professional development, and performance management (evaluation) for teachers and administrators; 3) paying for talent—compensating teachers and administrators; and, 4) summing up—what we can learn from Long Beach.

Introduction, Context, and Scene Setting

The Long Beach Unified School District (LBUSD) is located in the port city of Long Beach in Southern California, adjacent to Los Angeles. The district, the third largest in California (behind Los Angeles and San Diego), covers 129 square miles and serves four cities: Long Beach, Lakewood, Signal Hill, and Avalon (Catalina Island).

Long Beach's 88,000 students reflect both a microcosm of the diversity of California and its increasingly Hispanic complexion. More than half the district's students (51%) are Hispanic, 18 percent are African-American, 17 percent are white, 4 percent are Asian, 3.5 percent are Filipino, and the remaining 5.5 percent are classified as "other." More than two-thirds of Long Beach's students (68%) qualify for free and reduced-price lunch, the typical education proxy for poverty. About a quarter (24%) are classified as English language learners and among the ELL students, thirty-four (34) home languages are spoken.

Like many urban districts in California (and elsewhere), Long Beach's student enrollment is declining. Enrollment reached a high of 97,000 students in 2003, and each year since, has experienced a steady downward trend. Currently, the district loses about 2,000 students per year.

The Long Beach school district maintains 93 school sites—49 elementary schools, 26 K-8 and middle schools, 11 high schools, 5 charter schools, and 1 K-12 school. The district counts among its ranks 13,000 employees, about 4,000 of them teachers.

Long Beach is a tight knit community. The majority of employees (as many as 60-70 percent) live in Long Beach; many have children in the district's schools. This is a community of "stayers." Many of the district's employees themselves grew up in Long Beach and have deep community roots.

The Long Beach Unified School District has a proud history of steadily increasing academic achievement. Achievement in California is measured by the Academic Performance Index (API). Schools earn a number 200 to 1,000 based on measured growth, or improvement, on statewide testing results. The State Board of Education established a target of 800 to which schools should aspire. Long Beach's district score of 729 outpaces many similarly situated urban districts.

More closely examining Long Beach's achievement levels reveals a district with an increasingly upward trajectory. In reading and math at the elementary, middle, and high school levels, Long Beach outperforms other California districts serving similar student populations. The district has succeeded in narrowing the achievement gap between Hispanic and white elementary students in high school reading and elementary reading and math. And the achievement gap between African-American students and their white peers has closed faster in Long Beach elementary school math and middle school reading and math than in other districts in the state.

Long Beach makes a substantial effort, with programs and support, to ensure that all of its students will have access to a college education. The widely-touted AVID (Advancement Via Individual Determination), a college preparatory program for economically disadvantaged students who often are left out of the press for college, currently operates in 29 Long Beach middle and high schools. The district also has worked diligently to increase enrollment in Advanced Placement courses, upping enrollment in these classes by 50 percent since 2003. Significantly, enrollment for African American and Hispanic students increased during this same period by 75 and 62 percent, respectively.

Long Beach is able to boast high-performing schools in every segment of the district. Its stellar accomplishments have earned it a number of national honors. The district is the 2003 national winner of the Broad Prize for Urban Education¹ and is a finalist for Broad's 2007 prize to be awarded in fall 2008. *Newsweek* magazine named six of Long Beach's high schools to its 2008 list of top U.S. high schools.

A five-member school board governs the Long Beach school district. Board members are elected by geographic district for four-year terms. Long Beach's school board was fairly stable with a number of long-serving members until 2002 when it began to experience some turnover. The board was further roiled in 2006 when the local teachers' union, the Teachers Association of Long Beach (TALB), supported three challengers, two of whom unseated incumbents. TALB again supported two challengers to unseat remaining incumbents in 2008, but these individuals failed to win election.

Long Beach is a fiscally independent district. Owing to California's school finance system, two-thirds (67%) of the district's revenue comes from the state. Until this year (2008), the district operated with a budget of approximately \$800 million. California's historic budget shortfall² resulted in Long Beach's budget being slashed by \$44 million. These cuts are on top of close to \$50 million in cuts the district had been forced to absorb between 2002 and 2006 due largely to declines in state-provided revenue. Earlier budget cuts were made largely by reducing positions in central office. This year's cuts are requiring Long Beach to reduce or eliminate programs. The district, however, took a policy decision to avoid teacher lay offs. This recent history of substantial budget cuts in successive years makes Long Beach's story of improvement all the more remarkable.

¹ The Broad Prize is an annual award for an urban district that makes significant achievement gains while reducing the achievement gap. The Broad Foundation provides \$500,000 in scholarships to graduating seniors in districts that win the prize.

² California's budget shortfall as of May 2008 was \$20 billion.

THE LONG BEACH ROAD TO IMPROVEMENT

Long Beach's steady road to improvement began with the appointment of Carl Cohn as superintendent in 1992. A long-time district employee and Long Beach native, Cohn, was the first African-American superintendent in the district. Long Beach historically had had a reputation as a "good district," but this reputation had begun to wane by the time Cohn assumed office. He found himself confronting two critical issues.

First, the Long Beach community faced a general air of economic uncertainty. A large U.S. Navy base, the source of much local employment, had recently been closed by the federal government. In addition, McDonnell Douglas, at the time, the area's single largest employer, downsized its Long Beach operation.

The second issue swirled around the tense issue of immigration. Long Beach had begun to emerge in the 1980s as a center of immigration, largely for families from Mexico and Cambodia. Ethnic tensions crescendoed into gang violence, which spilled over into the schools.

Concomitant with economic uncertainty, rising immigration, and a changing complexion for the schools came steadily increasing enrollment. Between 1982 and 1992, the student population in Long Beach rose from 57,500 to 96,500. Increasing numbers of these students came from homes where English was spoken little, if at all, and poverty defined students' lives.

These issues would have presented challenges to any school district. But they were particularly hard on Long Beach, a district that had been slow to embrace its urban character. As the world began to change around it, Long Beach continued to see itself as "Iowa by the sea."

The superintendent who had preceded Carl Cohn had begun to make some important changes in the district. He had replaced many of the long-time "old guard" in the district and had established a good relationship with the powerful local teachers union, the Teachers Association of Long Beach (TALB), an affiliate of the California Teachers Association and the National Education Association. But during this superintendent's watch, student achievement had remained stagnant.

When Cohn became superintendent, he immediately began to make changes in the district. In an attempt to curb gang-related violence, Long Beach in 1992 became the first district in the nation to require school uniforms for all elementary and middle school students. What was important about this development was not simply the end result, but the way in which it was accomplished, a strategy that would continue to shape the way in which many of the district's policies evolved.

Before the uniform policy was implemented, principals were given the option of adopting school uniform requirements at their schools. At the same time, the district, under Cohn's leadership, engaged parents, teachers, and community members in wide-ranging discussions about the efficacy of a mandatory district-wide K-8 uniform policy. Following these discussions, the school board enacted policy requiring Long Beach students to wear uniforms. Thus, Long Beach's "pilot and consult" approach to designing and adopting new policies was born. It is a system that remains in place to this day.

As superintendent, Cohn set his sights on improving student achievement, and sought community partners in this effort. The result was the Long Beach Partnership, a coalition of the school district, California State University Long Beach, and Long Beach City College. Financial support for the early days of the partnership was provided by the Knight Foundation.

The Knight Foundation dollars funded the National Faculty, which brought together professors from major universities across the country to train Long Beach teachers on the content of key standards. This effort served as a motivating force to move CSU Long Beach and Long Beach Community College faculty to work with the district, a partnership that continues today.

Under Cohn's leadership, the district, with the support of its institution of higher education partners, initiated a two-year process of engaging Long Beach stakeholders (parents, administrators,

teachers, and community activists) around the development of academic standards for students. In a period before such standards existed in California or had become the national norm, this was a new kind of work for a school district.

Long Beach enacted its first set of content standards (in English/language arts) in 1995. Standards for all grades and subjects were completed by 1998. When California approved its own academic standards later in 1998, Long Beach adapted its standards to align with the state's standards.

Superintendent Cohn focused his initial efforts on two discrete achievement-related goals:

- 1) ensuring that every student was reading at grade level by the third grade; and,
- 2) ending social promotion by the eighth grade.

Says Cohn, "We wanted to make every class one where we would put our own children." Under Cohn's leadership, K-8 achievement began to show substantial improvement.

Carl Cohn remained Long Beach's superintendent until 2002 when he was succeeded by Christopher Steinhauser. Steinhauser had begun his career in the district 26 years earlier as a teacher's aide, and had then moved up the professional ladder to become a teacher, an elementary principal, deputy superintendent (under Cohn), and then superintendent.

Where Cohn had focused on improving achievement in grades K-8, Superintendent Steinhauser launched an initiative targeted to the district's high schools. His ambitious program sought to increase the academic achievement of all students; close the achievement gap; improve high school culture and climate; and build high school leadership capacity to design and sustain improvement efforts. Ninth grade students reading two or more years below grade level were singled out for intervention, including mandatory summer school and special classes.³

³ The school board had ended social promotion in ninth grade in 1999.

Institutionalizing Instructional Improvement

Long Beach has, for a decade and a half, been centered on maintaining high academic standards and expectations for all students and continuing to improve levels of instructional performance. The core of the district’s instructional improvement strategy is the “Essential Elements of Instruction.”

Based on the work of Madeleine Hunter, the Essential Elements revolve around the belief that teaching is a constant stream of decisions structured around a series of “principles of learning” that guide teachers’ actions. Using these principles, teachers establish an objective for each lesson, teach the lesson, and correct for students’ level of understanding, using diagnostics and assessments. Effective teachers use strategies that ensure students are constantly engaged in what they are to be learning (called “active participation”) and help students employ their past experiences to relate to the current lesson (called “anticipatory sets”). Motivation, closure, and reinforcement are also part of the Essential Elements of Instruction.

Long Beach adopted the Essential Elements at Carl Cohn’s behest. Early in his superintendency, Cohn had completed a “listening tour” with school principals who had relayed to Cohn the dilemma created by the district’s burgeoning enrollment coupled with the state’s new requirement that class sizes in grades K-3 be reduced to a 20:1 ratio.⁴ These simultaneous circumstances resulted in an influx of new hires—600-800 per year—in Long Beach. These novice teachers were coming to the district from a variety of quite different teacher preparation programs. Cohn became convinced that these teachers needed to speak a common language around lesson planning and the fundamentals of teaching. The Essential Elements of Instruction seemed to fill that bill.

The Essential Elements are part and parcel of much of what Long Beach does. They infuse the preparation that Long Beach teachers, most of whom receive their certification from California State University Long Beach, receive. They shape the interviews for new hires, the district-run teacher induction program, and ongoing professional development.

An additional core belief infuses Long Beach’s approach to maintaining high levels of instruction: a belief in the capacity of its teachers. A central theory of teaching and learning that has guided many of the changes in Long Beach (propounded by Carl Cohn and continued by Chris Steinhauser) is that improving student achievement rests on building the capacity of teachers to diagnose their students’ needs and help them make academic progress. The district’s primary job is to enhance these efforts by providing appropriate support and, where necessary, intervention.

⁴ In 1996, California adopted Class Size Reduction. CSR required that all K-3 classes, as well as ninth grade English classes, be reduced to an average size of 20 students per teacher. The policy had a number of unintended consequences: Many elementary schools could not accommodate the additional required classes and found themselves holding class in auditoriums and portable buildings, on school playgrounds, and in other space that never was intended for classroom use. In addition, districts that needed to hire many new teachers to staff the new classes often were forced to fill the positions with uncertified, and inexperienced, teachers.

Developing Local Assessments to Enhance the Effective Use of Data

Long Beach focuses considerable efforts on collecting, analyzing, and using student achievement data. The district makes use of two kinds of achievement data: 1) state assessments (the STAR—Standardized Testing and Reporting—system); and, 2) standards-based local assessments.

The state assessments are administered in the spring of each year. However, results are not available until the following fall, making these data neither timely nor useful for instructional purposes.

Thus, Long Beach employs local assessments. Currently, the district has more than 200 end-of-course exams and benchmark assessments, keyed to multiple grade levels and subject areas. Long Beach uses no off-the-shelf assessments, but through its research and curriculum offices, works with teachers to develop the district-relevant local assessments.

All of the benchmark assessments are aligned with the district’s curriculum pacing guides. The research and curriculum offices identify the topics covered by the curriculum, decide how long the benchmark assessment should be and how many questions it should include, and match questions with pacing guides to determine how much time to concentrate each test on particular topics. The district also makes sure the local assessments are aligned with the state assessment.

Local assessments are often field tested before they are distributed widely. Usually, questions are tested with groups of students, the psychometric characteristics of each item is examined, and district testing experts determine how closely benchmark probes correlate with established content standards. Local assessments become operational the fall following field-testing.

The frequency of local assessments varies by topic. Assessments may be given at the end of a course, quarterly, or every six weeks. The district is committed to a five-day turnaround for scantron assessment results, which are transmitted to teachers and principals. The district uses a “trainer of trainers” model (with curriculum leaders, department chairs in secondary schools, and experienced principals serving as trainers) to help teachers and principals interpret the assessment data. Local assessments are revised on an as-needed basis.

The district makes local assessment data accessible through a home-grown web-based system, named “LROIX,” an acronym for LBUSD Research Office Intranet.⁵ Teachers have access to the data about their students and principals to data about their schools. The district offers approximately 50 different kinds of customized data reports, from profiles of students detailing testing histories to reports describing where schools are doing well and where there is room for improvement. As part of the data system, the district maintains a continuous feedback loop, gathering information from teachers and principals about the usefulness of various kinds of reports and making adjustments accordingly.

⁵ The “X” in LROIX does not stand for anything. It was simply added after the system went through a major enhancement.

1. ACQUIRING TALENT IN LONG BEACH

Long Beach is that rare urban district that both historically and currently has little difficulty recruiting teacher and administrator talent. Talent acquisition in Long Beach is not a story of recent, explosive change, but rather a narrative of steady progress and consistency, making the most of homegrown talent.

Recruiting Talented Teachers

At present rates of enrollment shifts and employee attrition, Long Beach needs to hire approximately 200 new teachers each year. The district finds 80 percent of its teacher candidates at CSU Long Beach (with an additional complement at near-by CSU Dominguez Hills). The district does not employ the services of “outside partners,” such as Teach for America or New Leaders for New Schools, to find teaching or administrative talent.

Long Beach had a fleeting relationship with Teach for America about five years ago, and was hoping to work with the organization to help the district recruit always-in-short-supply math and science teachers. However, TFA made it a *quid pro quo* that, in exchange for helping the district to recruit these shortage area teachers, Long Beach would need to hire some of TFA-trained elementary teachers as well. The district did not need TFA elementary teachers, so the relationship ended.

One of Long Beach’s secrets to recruiting talented teachers has been for members of the district’s central administrative staff to become deeply involved in and, to a great extent, shape CSU Long Beach’s credential programs. All of the district’s curriculum specialists, for example, teach in the teacher credential program, the focus of which is to train teachers to teach in an urban setting. The Essential Elements of Instruction are woven into this program of teacher preparation.⁶

An additional component of the CSU Long Beach credential program involves service learning. Part of the Integrated Teacher Education Program (ITEP), this program aspect, required of all teachers studying for a multiple subjects credential⁷, combines the study of academic subjects aligned with California’s K-8 standards with professional preparation courses and fieldwork. In Long Beach, the fieldwork translates to work in the district’s schools, which offers LBUSD yet another opportunity to acquaint potential teachers with the district and help to pave the way for a successful transition from credential work to actual teaching in Long Beach.

LBUSD also uses a number of strategies to attract potential applicants to teaching. Exploring Teaching, a course developed in collaboration with CSU Long Beach, offers high school juniors and seniors an opportunity to learn about the teaching profession and to have some hands-on experience in an elementary school.

In addition, the district, in partnership with CSU Long Beach and Long Beach City College, makes a concerted effort to attract Long Beach natives (or at least residents) to teach in local schools. Faculty teams from the CSU campus and the community college make regular visits to district middle and high schools to encourage students to pursue college educations and seek teaching careers. Special emphasis is placed on encouraging potential minority candidates and individuals interested in teaching mathematics and science.

⁶ The district previously ran an English Learner Certification program until all experienced teachers held this certification. It is now part of the initial credential work.

⁷ Multiple subject credentials typically cover elementary grades. Teachers in middle school and high school departmentalized settings must earn single subject credentials.

The district's efforts to recruit able people is also advantaged by its long-standing, widely known public reputation as a "good place to work." Teachers seek positions in Long Beach and settle in for a career.

Selecting and Placing Teachers

Unlike many urban districts that do not offer employment contracts to new recruits until late summer or even early fall, Long Beach offers contracts in December for the following September for individuals who can fill positions in high needs areas (science, mathematics, special education). Unlike traditional teacher employment contracts, these early contracts are offered without reference to a specific assignment. In other words, these contracts are offered with the expectation that there will be teaching openings in these identified areas, though at the time the contracts are offered, the exact location of the opening is not known.

For teachers who are not in shortage fields and are not offered early contracts, the district uses online applications. Teachers submit initial application information through the district's website. Minimum qualifications include a Bachelor's degree, appropriate teaching credential (or current enrollment in a credential program in an area of high need)⁸, and a passing score on the California Basic Education Skills Test.⁹

Within three weeks of applying online for an open position (teachers apply for specific positions), candidates submit a packet of materials to the district's human resources office. The packet must contain a resume and cover letter; one letter of reference from the applicant's current principal or supervisor (or if the candidate is a student teacher, from the master teacher); and one copy each of the candidate's official college transcript and relevant teaching credential. The district's human resources office reviews all materials and conducts a background check and an initial screening interview.

Following these initial activities, the candidate is sent for an interview to the school with the opening for which the candidate is qualified. A committee composed of the principal, teachers at the school, classified employees, and parents conducts a school-based interview. Principals also use the Haberman STAR teacher interview tool as part of their interviewing process.¹⁰ The site committee recommends to the district whether the applicant is a suitable fit for the position. The district (not the school) makes official job offers.

To recruit in high needs areas, the district utilizes teacher websites, such as teachers-teachers.com and enjoin.org, to advertise, particularly for openings in mathematics, science, and special education. Using websites allows Long Beach to reach potential applicants in all areas of the country. According to district officials, this strategy has increased the district's applicant pool in hard-to-staff fields. In addition, Long Beach attends regularly scheduled recruitment fairs. The early contracts, previously described, makes it possible for the district not to lose qualified credentialed teachers to other districts.

Long Beach offers no special financial inducements for recruits in high need areas. But the district does try to bring applicants on board as substitutes before their contract year begins so they can become familiar with the district and the site to which they will be assigned.

⁸ This is called an "internship" in California.

⁹ The CBEST, designed to verify basic skills in English and mathematics, is required for a California credential.

¹⁰ Principals are given training in the Haberman method. In order to use this system, the Haberman company requires that it conduct the training. Haberman is a scenario-based interview tool designed to help districts select teachers who will remain in their positions and be successful.

Teachers currently employed in the district who are interested in voluntary transfers have the opportunity to apply for open positions before new hires are considered. Open positions are posted March 15. Teachers interview with schools that have the openings and are either selected or informed they are not the right fit. The district makes every effort to fill these open positions by the end of the school year for the following school year.

In addition, the recent budget cuts have resulted in teacher “consolidations,” or involuntary transfers, at some schools. In accord with the LBUSD-TALB contract, these transfers are made on the basis of seniority, with consolidated teachers offered preference for open positions before voluntary transfers and new hires. “Bumping” another teacher from an already held position is allowed only if the position is held by a temporary teacher.

Long Beach makes every effort to make the job application process user-friendly. The human resources office has adopted a customer service is the orientation, and the processes of hiring and placement seem to work smoothly and efficiently.

Recruiting and Selecting Administrators

Long Beach has had a varied number of open principal positions in the last several years: 8 in 2002-03; another 8 2004-05; 10 in 2005-06; 9 in 2006-07. The number then rose to 17 last year (2007-08) and dropped down to 4 for 2008-09. All told, the district has replaced half its principal workforce in the last five years and is likely to replace the other half in the next five years.

Long Beach works to create its own talent pipeline for principals. In order to attract top talent, the district runs specialized workshops for individuals considering the principalship. These workshops include tips on writing a cover letter, assembling a resume, and having a successful interview.

The district also offers a graduated series of workshops for individuals in various stages of considering an administrative career: a three day workshop for people interested in becoming assistant principals (the “aspiring administrators” workshop); a five-day workshop for assistant principals who seek to become principals (which includes five days of job shadowing a working principal); and a program for current teacher leaders that, in conjunction with CSU Long Beach, provides a fast track to an administrative credential.

District administrators proudly describe their hiring process as “transparent.” The process, they say, is open and known to all—no secrets, no mysteries. It is public information, for example, who is in the aspiring administrators program and who, therefore, is the likeliest to be placed in administrative positions as they become available.

Long Beach had a short-term relationship with Teach for America as part of the pipeline for administrators.¹¹ The district identified a pool of approximately nine TFA potential administrators. Two of these individuals made it through the district’s initial screening process. However, due to the budget collapse, the district determined to bring in only one outside candidate for potential administrative positions for the 2008-2009 year,¹² and that individual was a principal from Los Angeles.

Long Beach exemplifies the “grow your own” philosophy for administrators. Nearly all principals are selected from among district employees. Although applicants sometimes come to the district seeking principal positions, and the district advertises through the Association of California

¹¹ TFA is expanding the leadership aspect of its program and pursuing alternative pathways to administration.

¹² The budget dilemma created a reason for Long Beach not to accept this group of TFA administrative candidates. However, according to district officials, “TFA pushes too hard, too soon, too early in their careers for these people to be made principals. We just don’t think they’re ready.”

School Administrators (ACSA), it often is the case that the district considers only internal candidates. One recent exception is high school principals whom the district sometimes has difficulty securing and who, thus, may be recruited from the outside.¹³

As with teachers, most Long Beach administrators receive their administrative credential training at CSU Long Beach. District staff has worked assiduously with the university to “redo” the Tier 1 training program so that individuals are ready to apply for an administrative position in Long Beach when they finish their preparation.¹⁴ Courses in the program, which emphasizes the Baldrige principles of continuous improvement,¹⁵ are taught primarily by LBUSD administrators. The official in charge of leadership development for the district spent halftime for a year at CSU Long Beach reconfiguring this program and simultaneously establishing CSU Long Beach’s Ed.D. program that attracts a number of school administrators.

Twenty people currently are enrolled in CSU Long Beach’s Tier 1 administrator preparation program. These individuals likely will return to LBUSD in administrative positions.

Selecting and Placing Administrators

Long Beach uses the administrative analog of the Haberman tool—the STAR Urban Administrators questionnaire—to select new principals. Again, the Haberman company conducts the training for this. The Haberman interview protocol (only a portion of which Long Beach uses) composes only one part of Long Beach’s selection process¹⁶.

The district appraises potential administrators on the basis of 10 “power standards” in the areas of instructional, operational, and public leadership. The goal is to select people for administrative positions who will: 1) create a results-oriented culture; 2) reinforce effective instructional practice; 3) enhance staff capacity to lead improvement in instruction and student achievement; 4) facilitate and support staff collaboration; 5) use data to set goals, inform decision-making, and track progress; 6) develop, implement, and evaluate interventions for students who are not achieving; 7) maintain discipline and order; 8) communicate effectively with staff and with students’ families and community members; 9) use skill in written and oral communication; and, 10) develop and maintain a management style that meets the diverse needs of both students and staff. A panel of current principals scores each applicant’s cover letter and resume on these ten dimensions using a district-developed scoring guide.

When a principal position opens, the district makes every effort to “match” the person best qualified for the job with the available position. This “matching” is enhanced through the school-based interview conducted by the prospective principal’s teachers and community members.

¹³ When asked why it is hard to find high school principals, one district official suggested that the root of the problem may be that elementary and middle school principals historically have been allowed to select their own assistant principals and they may not always select individuals who are good principal material.

¹⁴ California has a two-tier administrative services credential structure. Administrators receive a preliminary five-year credential when they have met the basic requirements. A clear credential requires the completion of additional requirements, including two years of successful service in a full-time administrative position.

¹⁵ Employing the Baldrige system, the organization conducts regular assessments to evaluate and improve performance based on criteria that include leadership; strategic planning; student and market focus; measurement, analysis, and knowledge management; workforce focus; process management; and, results.

¹⁶ In fact, the district does not use the entire protocol, citing some of the questions on it as “inconsistent” with Long Beach’s culture.

2. TALENT MANAGEMENT, DEVELOPMENT, AND RETENTION

Recruitment is not a significant issue for Long Beach. Unlike many urban districts, the district has little difficulty recruiting well-qualified teachers or administrators. The district, however, devotes considerable time, attention, and resources to providing professional development and support to teachers and administrators who are new to the district or new to their jobs.

Inducting Teachers

Long Beach was one of the districts selected to pilot California's then-fledgling Beginning Teacher Support and Assessment (BTSA) Program—an induction strategy—in 1984.¹⁷ Building on this experience, early in the 1990s, Long Beach secured a grant from the National Education Association's education foundation, the National Foundation for the Improvement of Education (NFIE). The district used the money to bring together its professional development and categorical program leaders with representatives of local institutions of higher education for the purpose of continuing to reshape induction and professional development for new teachers.

The goal of these efforts was to define a common core of knowledge detailing what teachers should know and be able to do after three years of teaching. The district and its partners used the Essential Elements of Instruction as a foundation on which to build a standards-based system of teaching for novices. The program included content and pedagogical professional development.

Establishing this program proved to be both useful and prescient. With state mandated class size reduction, increasing enrollment, and the concomitant requirement to support hundreds of new teachers each year, Long Beach had a clear need for a large-scale, focused induction program. The district adapted what it had learned through its own experience and set about building the Long Beach version of the “new teacher project.”¹⁸

All teachers new to LBUSD are required to attend a five-day New Teacher Institute in August of the year they are hired. The Institute provides these novices with an introduction to the Essential Elements of Instruction and grade level or subject specific information on standards-based curriculum and assessment. For each of the first two years of their employment, new teachers in Long Beach also participate in seven release days of professional development focused on literacy and math for elementary teachers and subject area content for secondary teachers.

As part of its support and induction program, each new teacher in Long Beach is assigned a coach.¹⁹ The coach, a member of the faculty at the new teacher's school, knows the school culture, is familiar with school procedures, and, to the extent possible, teaches the same grade or subject as the novice.

Coaches must have at least four years of successful classroom teaching and receive district-provided New Teacher Coach training around the Essential Elements of Instruction, developmental needs of beginning teachers, understanding the role of formative assessment in ongoing professional development, and helping novices to analyze student work. Coaches provide support around the California Standards for the Teaching Profession (CSTP). Adopted by the state in 1997, the CSTP play off the standards adopted by the National Board for Professional Teaching Standards and include

¹⁷ BTSA is now a two-year state funded induction program in which all new teachers must participate in order to receive a Professional Clear credential.

¹⁸ Long Beach calls its support program The New Teacher Project. It preceded the national organization of the same name.

¹⁹ The principal selects a site coordinator for the school; the principal and site coordinator select the coaches.

engaging and supporting all students in learning; creating and maintaining effective environments for student learning; understanding and organizing subject matter for student learning; planning instruction and designing learning experiences for all students; assessing student learning; and, developing as a professional educator.

Teachers and coaches in Long Beach remain together for two years, the length of the state-required BTSA induction program. Coaches meet with the new teachers they are supporting one-on-one for at least one hour each week. They observe classroom practice, engage the teacher in reflective conversations around the California Standards, and help each new teacher develop an Individual Induction Plan, meant to guide the new teacher's early years of professional growth and development.

One of the state's BTSA requirements is for a formative assessment for all novice teachers. Long Beach created its own assessment (rather than using the state-designed one) and won approval to use it from the state's Commission on Teacher Credentialing. The district's formative assessment system includes district-developed rubrics and levels for each standard. Coaches assist novice teachers in rating their practice on each standard as "practice not consistent," "developing beginning practice," "maturing beginning practice," or "experienced practice". In the spirit of formative assessment, these appraisals are not part of evaluation or tenure decisions, but are meant to appraise professional growth over time.

In 2003, school districts in California submitted plans to the state's Commission on Teacher Credentialing to enable districts to grant teachers their Professional Clear credentials. Long Beach's plan was approved. In addition to support and assessment, the district now provides additional training in the area of equity (including for English learners and special populations) and requires teachers to demonstrate application of this knowledge in the service of improving student learning.

At the end of the two-year program of support and induction, the district recommends to the state for clear credentials those who have successfully completed the program. Long Beach's teacher induction program is funded from a combination of state designated dollars (about \$1.5 million a year) and creatively deployed federal funds.

Perhaps because the district shapes teacher preparation and initial teacher induction so thoroughly, Long Beach does not face a teacher retention problem. Most teachers who come to the district understand what is expected of them when they are hired. They are carefully supported and inducted and, according to district officials, commit to the district long-term because of the district's reputation for strong professional development and support and a culture of "family." As a result, the district's retention rate hovers at or above 90 percent for teachers who have been teaching there for at least three years.

Inducting Administrators

Long Beach goes to considerable lengths to ensure new administrators have the skills and dispositions to handle their jobs. The district supports leadership training for both new administrators and for those who aspire to administrative positions.

New and aspiring administrators participate in summer institutes that include topics such as teacher conferencing (for evaluation purposes), budgeting, special education (always complicated because of the many rules and regulations), and preparing agendas and running meetings.

In addition, six administrator coaches²⁰ provide intensive first-year mentoring for new principals. Coaches are assigned to work with these novices particularly on issues of long-range planning. Monthly workshops for new principals are designed around common issues that arise at their schools. And new principals receive a district-developed monthly newsletter, the "Newbie News."

²⁰ The number may change depending on the number of new principals.

The “aspiring principals” program was initiated on the theory that, if appropriate administrative selections are made initially, success is more likely when these individuals become principals. As part of this program, aspiring principals “shadow” mentor principals for five days.²¹

Once a new principal is named, the district brings together members of the staff of the principal’s school to talk with the incoming principal about school issues and staff expectations. The district also conducts a school survey and conveys the results to the new principal.

Long Beach is the recipient of a 2008 grant from the Broad Foundation for leadership development. The program originally was intended to provide a year of fulltime training for selected principals-to-be who would act as apprentices to current principals. However, as a condition of the grant, the district was obligated to provide matching funds. With the budget decline, Long Beach found it did not have the requisite dollars for this program for 2008-2009. Thus, the program was restructured with fewer apprentices, all of whom have assume half-time administrative assignments and spend half-time shadowing experienced principals for a year. Broad will assume half the cost of this program

As with teachers, retention of principals is not a problem for Long Beach. Average principal tenure is more than 10 years.

Continuous Improvement for Teachers and Administrators

The watchwords for Long Beach’s professional development for both teachers and administrators are “continuous improvement.” The district’s continuing education programs are carefully targeted to ensuring that classroom and administrative employees are kept abreast of new developments and effective techniques in their fields.

Professional development for teachers

The guiding principle of teacher professional development in Long Beach is, to borrow a page from the National Board for Professional Teaching Standards, what teachers need to know and be able to do at various stages of their career. Embedded in professional development are expectations for teacher learning linked to improving student learning.

The district’s professional development offerings change regularly with foci spanning enhancing teachers’ content knowledge, becoming adept at differentiated instruction, and using data to shape instruction. Underlying principles garnered from research about the characteristics of good professional development—including that is closely linked to classroom practice, is job-embedded, incorporates content and pedagogy, and involves opportunity for collaboration with colleagues—shape Long Beach’s professional development program.

Professional development in Long Beach is funded primarily out of Title II²² federal dollars, to the tune of approximately \$6 million per year. Only a very small amount of district general fund revenues are put toward professional development.

In order to bolster its professional development funds, Long Beach often submits proposals for additional funding. Dollars from the federal Reading First initiative, for example, have provided intensive training for teachers in grades K-3 at 14 schools on the implementation of the district's adopted curriculum. A major part of this training was on the use of assessments to guide instructional practice in the classroom. Teachers implemented formal assessments every six weeks and transferred results to a computer-based program that provided the school with extensive data to use in analyzing student progress. Data from this system became the foundation of conversations among teachers, site

²¹ Mentor principals are both self-nominated and nominated by assistant superintendents. They receive training from the district in coaching.

²² This is the teacher and principal training section of No Child Left behind.

administrators, and coaches, and shaped agendas for grade level meetings. These discussions resulted in classroom level changes in terms of grouping strategies, instructional skills, and individual student plans.

At the district level, professional development is conducted by the curriculum leaders for each content area and by a team of coaches. At the school level, site coaches, principals, and department chairs in secondary schools have responsibility for professional development.

In order to determine what kind of professional development to provide, the district conducts an annual professional development needs assessment among teachers as well as a review of professional development plans. In addition, curriculum specialists visit each high school twice a year to hold conversations with teachers and principals to determine their professional development needs.

In order to let teachers know the professional development offerings available to them, the district publishes an online professional development catalog three times a year. Teachers can register for the district-offered courses online. Long Beach consistently has waiting lists for its professional development offerings.

Long Beach also provides teacher professional development in the form of specialized certification. The district runs its own Institute for Advanced Placement to certify teachers to teach these college level courses. Endorsed by the College Board, the Institute is free for Long Beach teachers; those from other districts pay a fee. Currently, 250 teachers (50 of them from Long Beach) are enrolled in the Institute.

An additional district-offered certification is for gifted and talented education (GATE). The focus of this program is on pedagogy, strategies for teaching students who are succeeding academically and need additional challenges. Teachers do not need to be assigned to GATE classes to participate in the 45-hour certification program. Classes are conducted after school by Long Beach GATE-certified teachers. Teachers are not paid for the time, but earn salary credit for certification. More than 300 Long Beach teachers currently are enrolled in the GATE certification program.

Finally, the district funds support programs for teachers interested in earning advanced certification through the National Board for Professional Teaching Standards. The district offers both a pre-candidate and a candidate support program. The pre-candidate support program includes five months of preparatory professional development offered by district Board Certified teachers. A year's candidate support is available for those who choose formally to pursue Board Certification. The district pays the fee of \$2,500 for teachers who complete the pre-candidate program and move on to candidacy. Long Beach has 100 National Board Certified Teachers with 20 more in process.

Professional development for administrators

Long Beach continues its tradition of providing relevant professional development for practicing administrators. For example, elementary middle/K-8, and high school administrators meet monthly in their level groups for professional development that is germane to the time.

In keeping with the district's management focus, much of the professional development offered centers on Baldrige principles. Administrators can also select courses on practical issues they face, such as successfully conducting meetings, assembling a master schedule, budgeting, and compiling adequate documentation for discipline cases. Professional development choices can be found in the administrators' online catalog.

Long Beach often selects a "special focus" for administrator professional development. This past year, that focus has been "courageous conversations" and "crucial conversations."

Working with the Ukleja Center at CSU Long Beach,²³ this special study has centered on enhancing administrators' ability to have honest conversations with teachers about performance. The work focuses on an issue that is not unique to Long Beach, but is rarely addressed. That is the issue of generational leadership, namely, that different generations of employees hold different expectations about their jobs and about their relationships with their supervisors.

These generational differences (teachers in one school may be of different generations; the principal may be of a different generation than teachers) can create schisms that can impact the operation of the school. This special training for administrators represents an example of how Long Beach seizes opportunities to make professional development relevant for school administrators.

Performance Management

Effective performance management, or evaluation, is an extension of good professional development. Teacher evaluation is a rare area in which Long Beach's system could use an added dose of rigor and relevance.

Evaluating teachers

State law requires evaluation every year for probationary teachers, every other year for permanent teachers. Teachers who have taught successfully for 10 years can choose to be formally evaluated very five years, but must conduct action research in the non-evaluation years.

The current teacher evaluation system in Long Beach is based on a 20-year old evaluation protocol. Under the terms of this (very traditional) evaluation system negotiated between the district and TALB, the principal (or assistant principal) conducts up to three classroom observations, holds a post-observation conference with the employee, and provides a written performance report that includes a rating of "satisfactory" or "unsatisfactory." Evaluation centers on matters such as teacher: pupil relationships and professional judgment. Student test scores not a part of the teacher evaluation system.

The district is seeking to change the evaluation system so that performance review focuses more squarely on the California Standards for the Teaching Profession. A pilot evaluation has been underway that incorporates the CSTP and rates teachers as "below basic," "basic," or "proficient." A joint union-management committee is meeting to try to reach agreement on such a system for the district as a whole.

Long Beach also has a peer assistance and review program (PAR) for underperforming experienced teachers. The program, which is governed by a nine-member joint union-management panel (5 teachers appointed by TALB, 4 administrators appointed by the district), provides intensive support and professional development for experienced teachers who are determined by their principal to be struggling in the classroom.

Teachers typically are placed in PAR for one year. During that time, they are closely mentored by specially selected experienced teachers (called Consulting Teachers) who are released from their regular classroom duties for up to three years to serve full time in this capacity. At the conclusion of the year, the Consulting Teacher conducts a formal evaluation of the teacher in PAR and makes a report to the PAR Panel. The Consulting Teacher may determine that the teacher has improved

²³ The center is funded by the Boeing Corporation and housed within CSU Long Beach's College of Business Administration. The center focuses on applied ethics in business and the professions.

sufficiently to be released from PAR, may recommend additional support, or may recommend termination. The PAR Panel makes the final recommendation to the superintendent.²⁴

Evaluating administrators

Administrator evaluation in Long Beach is based on the 10 “power standards” previously described in the section on administrator selection. Assistant superintendents conduct appraisals of site administrators based on these standards every year for the first three years of appointment, every other year thereafter.

Administrator evaluation is organized as a collaborative endeavor. The assistant superintendents set goals for the principals whom they supervise, requesting supporting data that the school is making progress. Though not required by law, in Long Beach, this process is repeated annually.

²⁴ The district currently has only one PAR “coach,” deciding to invest the dollars in coaches and specialists who can ensure that those who provide support to struggling teachers can be matched by grade level or subject area.

3. PAYING FOR TALENT

New forms of compensation, particularly for teachers, are high on the policy agenda. Long Beach, however, has not strayed far from traditional teacher or administrator pay structures.

Compensating Teachers and Administrators

Teachers in Long Beach are paid on the single salary schedule. Salaries increase on the basis of years of experience and units accrued. With a starting salary of \$49,800 for a teacher with a Bachelor's degree and a credential, and a top salary of \$93,800 for a teacher with 29 years experience and a BA plus 75 units, Long Beach's salaries are competitive with surrounding districts'.

Long Beach offers some modest variation from the rigidity of the single salary schedule. The district, for example, provides up to 15 years salary credit to new hires for fulltime public school teaching experience²⁵ and up to four years' credit for "related duties," such as private school teaching, overseas teaching, or running a museum education program.

The district also offers a small number of pay incentives. Speech and language specialists, often in short supply, receive a five percent salary "bump." New teacher coaches earn \$1,000 per year for each teacher they coach (typically, one to two per year). An up to 10 percent bonus is awarded to Board Certified teachers—five percent for becoming Board Certified, and another five percent for NBCTs who provide 60 service hours in curriculum development, support for student teachers, or support for struggling experienced teachers. This bonus is renewable annually for the life of the certificate. Consulting Teachers in the PAR program also earn a stipend. These incentives notwithstanding, Long Beach has not ventured very deeply into the world of alternative compensation.

Administrators in Long Beach are also paid on a single salary schedule, analogous to the teacher pay plan. However, administrators' salaries do vary by "rankings" based on the size of the school. In other words, salaries for school principals rise with the number of certificated staff for whom the principal is responsible. As with teachers, Long Beach has no other widespread pay incentives for administrators.

²⁵ Districts in California typically offer seven years of credit on the salary schedule for prior experience.

4. SUMMING UP LONG BEACH

It would be difficult to classify Long Beach as anything other than a successful urban district—something of an outlier in itself. The district has a stable history of steady improvement in a district culture of high expectations for teachers, administrators, and students.

When Carl Cohn was asked what accounts for the smoothness of the operation of the central administration, why when people change jobs or even leave the district (a fairly rare occurrence), the district does not lose a step, Cohn replied, “The bench strength is always strong. You can go two to three deep...” In other words, knowledge of how elements of the system work are not the province of a single individual, but of a team of colleagues.

While Long Beach does not use outside agencies in area such as recruitment, it does make use of community resources in the form of close relationships with local institutions of higher education, as Carl Cohn says, “marrying inside talent to outside expertise.”

This is a district that sometimes is viewed by outsiders as a “closed system.” It rarely uses prepackaged programs or outside partner organizations to do what Long Beach believes it can do itself, and not jeopardize its important organizational culture. Long Beach believes its “do it yourself” approach is why programs and approaches “stick.” And it is hard to argue with success in the form of increasing student achievement.

Long Beach is clear about its priorities. Hit hard by California’s budget cuts this year, the district accomplished dollar reductions by, in the words of one district official, “cleverly supplementing not supplanting.” Some programs were cut (e.g., high school coaches) or curtailed (the Broad principal internships). But the bulk of the budget reductions were absorbed at central office so as to impact the students and the classroom as little as possible.

A Quick Word About Labor-Management Relations

Labor-management relations is not a focal point of this case study. However, given the significance of union-district relations to everything from establishing teacher working conditions to shaping the way in which district resources are allocated, it seems appropriate to devote a paragraph or two to it here.

Labor-management relations in Long Beach historically were stable and cooperative. Carl Cohn’s predecessor as superintendent worked hard to establish an effective working relationship with the local TALB leadership. Long Beach, despite times of labor-management tension, has never experienced a teachers’ strike.

With a recent shift in local union leadership, relations have become tenser, less relaxed, less predictable. However, according to district officials, relations with the teachers’ union seem to be stabilizing. The parties meet and talk regularly and try to resolve problems before they blossom. As an example of improving relations, TALB invited the district this year, for the first time in three years, to TALB’s celebration for retiring teachers.

Long Beach’s local union is very traditional in approach. It seems to play no role, for example, in the induction of new teachers, and has no designated reform program of its own, no area beyond the traditional wages, hours, and working conditions in which it has chosen to involve itself. Any agreements between the district and the union exist as part of the formal contract. TALB, in keeping with CTA practice, does not enter into extra-contract agreements, such as trust agreements, memoranda of understanding.

Burnishing Its Reputation

Long Beach has earned a well-deserved reputation as a successful urban district. The reasons for the district's success are not mysterious:

- Long Beach provides a great deal of support aligned to district goals for new and continuing principals and teachers.
- The district takes a methodical and consistent approach to change and improvement. The Essential Elements of Instruction lie at the heart of these improvement efforts. Pilot programs of promising practices are first tried out in a few schools, their impact on student achievement is assessed, and, if the results are favorable, the program is taken to scale.
- A culture of high expectations (and shared expectations) permeates the district.
- The district is not infected by the “siloeing” so common to school district central administrative structures. Staff work together, and across departments.
- Long Beach does not skimp on communication. The district regularly seeks input from stakeholders, ensuring that programs authentically reflect a top down, bottom up hybrid approach. And communication does not stop with seeking views. A continuous feedback loop is a key element of Long Beach's ongoing improvement efforts.

Long Beach Unified is facing a number of challenges: continuing budget cuts; declining enrollment; ongoing pressure to improve administrator training (compounded by the fact that 50 principals plan to retire within the next five years). Yet throughout the whirl of sometimes unanticipated or unwelcome change, the district maintains a singular focus: what is best for students. Living the district's motto, “Every student, every day,” is perhaps the most common expression of The Long Beach Way.