Education Policy Planning Committee of the Whole

Wednesday, September 19, 2007
1:45 p.m.
This meeting will begin immediately following the previous session.

Board Room, 4th Floor
Public Conference Call Access Number: 1-866-297-6391 (listen only);
Confirmation # 19109997

AGENDA

1. Roll Call

2. Board Member Participation by Other Means

3. Public Participation

4. Minutes of the June Education Policy Planning Committee Meeting (pp. 2-4)

5. Student Advisory Council Introductions (Andrea Wingo, Matt Vanover, Mark Williams) (pp. 5-6)

*6. Proposed Changes to NASBE Public Education Positions (David Fields) (pp. 7-11)

7. District Consolidated Plan (pp. 12-14)
(School Improvement Plan, District Improvement Plan and Technology Plan)
(Rene Valenciano, John Perkins, Gail Lieberman, Myron Mason)

8. Illinois College and Work Readiness Partnership – Phase III: Targeted Interventions (pp. 15-56)
(Chris Koch, Rene Valenciano)
Others Attending: Jonathan Furr and Elliot Regenstein, Holland & Knight;
William Guenther, Rich O’Neill, and Julie Corbett, Mass Insight Education

9. Committee Agenda Planning

10. Adjourn
The Education Policy Planning Committee meeting convened at 10:30 a.m.

1. **ROLL CALL:** Dr. David Fields requested a roll call. See above.

2. **BOARD MEMBER PARTICIPATION BY OTHER MEANS:** There was no participation from Board members by any other means.

3. **PUBLIC PARTICIPATION:** Kevin Cogdill, Superintendent of Marissa School District, was in attendance to voice his concerns over the Enhancing Education through Technology grant.

Representatives from several schools in the Chester School District were in attendance to discuss their successes with the Enhancing Education through Technology grant.

4. **MINUTES OF THE MAY 2007 EPPC MEETING:** The Committee approved the minutes from the May 2007 EPPC Meeting.

5. **DISTINGUISHED PRINCIPAL LEADERSHIP INSTITUTE (Jason Leahy and Fred Singleton, Illinois Principal’s Association):** Jason Leahy and Fred Singleton were in attendance to discuss the development of the Illinois Distinguished Principal Leadership Institute.

6. **CONTRACTS AND GRANTS OVER $1 MILLION:**

   a. **FY 08 21st Century Community Learning Center Grants (Myron Mason):** Myron Mason was in attendance to obtain the Committee’s approval for the FY 08 21st Century Community Learning Center Grants.

   The Committee approved this item for a full Board vote at the plenary session.

   b. **Illinois Interactive Report Card Contract (Connie Wise):** Connie Wise was in attendance to obtain the Committee’s approval for the renewal of the contract with Northern Illinois University for the refinement and maintenance of the Illinois Interactive Report Card.

   The Committee approved this item for a full Board vote at the plenary session.
c. **Student Information System (SIS) contract renewal (Connie Wise):** Connie Wise was in attendance to obtain the Committee’s approval to renew the contract with IBM for the enhancement, maintenance and support of the Student Information System.

The Committee approved this item for a full Board vote at the plenary session.

d. **Harrisburg Project Contract (Jodi Fleck):** Jodi Fleck was in attendance to obtain the Committee’s approval for the renewal of a contract with the Harrisburg Project to maintain and revise software used to collect and report special education data.

The Committee approved this item for a full Board vote at the plenary session.

e. **Illinois Statewide Technical Assistance Center (ISTAC) Grant (Jodi Fleck):** Jodi Fleck was in attendance to obtain the Committee’s approval for the renewal of a grant with the Illinois Statewide Technical Assistance Center.

The Committee approved this item for a full Board vote at the plenary session.

f. **FY 08 Illinois Virtual High School (IVHS) (Technology for Success) Intergovernmental Agreement (Dana Kinley):** Dana Kinley was in attendance to obtain the Committee’s approval to execute an Intergovernmental Agreement with the Illinois Mathematics and Science Academy to serve as fiscal agent for the administration of the Illinois Virtual High School in FY 08.

The Committee approved this item for a full Board vote at the plenary session.

g. **FY 08 Learning Technology Centers (LTC’s) Grant (Technology for Success)(Dana Kinley):** Dana Kinley was in attendance to obtain the Committee’s approval to award continuing grants to selected Regional Offices of Education to administer fifteen LTC’s in FY 08.

The Committee approved this item for a full Board vote at the plenary session.

h. **FY 08 Enhancing Education through Technology Grants (Dana Kinley):** Dana Kinley was in attendance to obtain the Committee’s approval to award the Enhancing Education through Technology Grants.

The Committee approved this item for a full Board vote at the plenary session.

i. **Reading First Wireless Generation Contract Amendment (Dana Kinley):** Dana Kinley was in attendance to obtain the Committee’s approval to amend a contract for professional development for the Reading First program with Wireless Generation.

The Committee approved this item for a full Board vote at the plenary session.

7. **PRE-K REPORT TO THE GENERAL ASSEMBLY (Connie Wise):** Connie Wise and Kalpana Desai were in attendance to provide the Committee with the results from the Illinois Pre-kindergarten Program for Children At Risk of Academic Failure 2005-06 Evaluation Report.

The Committee approved this item for a full Board vote at the plenary session.

(LUNCH BREAK – EPPC reconvened at 11:45 p.m.)

8. **ILLINOIS COLLEGE AND WORK READINESS PARTNERSHIP (Phase 2: Longitudinal Data System) (Chris Koch):** Jon Furr of Holland & Knight and Sally Askman of the Gates Foundation were in attendance to discuss the status of Phase II of the Memorandum of Understanding for the Illinois College and Workforce Readiness Partnership and to present their recommendations for the
further development of Illinois’ longitudinal data system. Board members expressed concerns about
the over-reliance on data to drive school-level decision making as well as the speakers’ suggestion
for common course labels. The Committee asked Superintendent Koch to return to a future meeting
with a prioritized list of recommendations for further Board action.

9. BURNHAM PLAN DISCUSSION:
   In attendance:
   Max McGee, Superintendent of Wilmette #39
   Dave Bonnette, Retired Superintendent of River Forest SD #90
   Jo Anderson, Executive Director, Illinois Education Association
   Mitch Roth, General Counsel, Illinois Education Association
   Mary Ellen Guest, A+ Illinois

   The above were in attendance to present the Burnham Plan for a World-Class Education. Board
   members expressed many concerns about the plan, including that the Board was not offered the
   opportunity to help develop the plan.

10. ADJOURNMENT: Joyce Karon moved to adjourn the EPPC meeting and Chris Ward seconded the
    motion. The EPPC meeting adjourned at 2:00 p.m.
TO: Education Policy Planning Committee

FROM: Christopher A. Koch, Ed.D., State Superintendent of Education  
Matt Vanover, Director of Public Information

Agenda Topic: Student Advisory Council Operational Staffing Plan

Materials: Membership List

Staff Contact(s): Andrea Wingo, Human Resources  
Mark Williams, Career Development & Preparation  
Andrea Preston and Ann Murraro, Public Information  
Jean Ladage, Board Services Coordinator

Purpose of Agenda Item
During the month of July, Andrea Wingo, Jean Ladage and Andrea Preston read and analyzed student essays and letters of recommendations for each candidate applying for the Student Advisory Council. All candidates were interviewed. Based on the review of materials submitted and interviews conducted, selections were made for eleven new Student Advisory Council members. With these eleven new members, that brings the total to fifteen members.

Relationship to/Implications for the State Board’s Strategic Plan
Related to Goal 2: Improving Education for all Students

Expected Outcome(s) of Agenda Item
The Student Advisory Council members will be at the Board’s September Education Policy Planning Committee to introduce themselves and listen to the Committee’s discussion of policy issues.

Next Steps
The members of the Student Advisory Council will have discussions, get to know one another and participate in team building exercises throughout the rest of the day on September 19 and 20. They plan to elect officers, discuss potential projects and determine meeting dates for this school year.
## Student Advisory Council 2007-2008

<table>
<thead>
<tr>
<th>Name</th>
<th>Year in School</th>
<th>City</th>
<th>County</th>
<th>High School</th>
</tr>
</thead>
<tbody>
<tr>
<td>Micah Berman*</td>
<td>Senior</td>
<td>Urbana</td>
<td>Champaign</td>
<td>University of Illinois Laboratory School</td>
</tr>
<tr>
<td>Sarah Chapman</td>
<td>Sophomore</td>
<td>Shabbona</td>
<td>DeKalb</td>
<td>Indian Creek H.S.</td>
</tr>
<tr>
<td>Skye David</td>
<td>Junior</td>
<td>Lawrenceville</td>
<td>Lawrence</td>
<td>Lawrenceville H.S.</td>
</tr>
<tr>
<td>Dirk DeDecker</td>
<td>Senior</td>
<td>Peoria</td>
<td>Peoria</td>
<td>Richwoods H.S.</td>
</tr>
<tr>
<td>Nicholas Diaz *</td>
<td>Junior</td>
<td>Northlake</td>
<td>Cook</td>
<td>West Leyden H.S.</td>
</tr>
<tr>
<td>Michele Dumoulin</td>
<td>Senior</td>
<td>Marine</td>
<td>Madison</td>
<td>Triad H.S.</td>
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<tr>
<td>Sarah Freebairn</td>
<td>Senior</td>
<td>Newman</td>
<td>Edgar</td>
<td>Shiloh H.S.</td>
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<tr>
<td>Kendall Hoover</td>
<td>Junior</td>
<td>Hinsdale</td>
<td>DuPage</td>
<td>Hinsdale Central H.S.</td>
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<tr>
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<td>Senior</td>
<td>Mounds</td>
<td>Pulaski</td>
<td>Meridian H.S.</td>
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<tr>
<td>Gabrielle Kendrick</td>
<td>Junior</td>
<td>Chicago</td>
<td>Cook</td>
<td>Chicago CPS/ School for Ag Science</td>
</tr>
<tr>
<td>Nick Knuffman</td>
<td>Senior</td>
<td>Coatsburg</td>
<td>Adams</td>
<td>Camp Point Central H.S.</td>
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<tr>
<td>Emma LePere*</td>
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<td>Millstadt</td>
<td>St. Clair</td>
<td>Belleville West H.S.</td>
</tr>
<tr>
<td>Ran Ma</td>
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<td>Champaign</td>
<td>University of Illinois Laboratory School</td>
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<tr>
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<td>Lake</td>
<td>Grayslake Community H.S. North</td>
</tr>
<tr>
<td>Lian States</td>
<td>Senior</td>
<td>Geff</td>
<td>Wayne</td>
<td>Fairfield Community H.S.</td>
</tr>
</tbody>
</table>

* Returning Students
TO: Illinois State Board of Education

FROM: David E. Fields, Chairman, Education Policy Planning Committee
       Jean Ladage, Board Services Coordinator

Agenda Topic: Consideration of proposed changes to NASBE Policy Positions

Materials: Description of Proposed Changes to NASBE Public Policy Statements on Designated Topics

Purpose of Agenda Item
Each October, the state delegate assembly meets during the NASBE Annual Conference at the business meeting to vote on proposed changes to the association's bylaws and public policy statements.

NASBE bylaws state that “The Public Policy Committee shall solicit new public policy positions and changes to the standing public policy positions from among the membership, meet at least ninety days prior to the Annual Business Meeting to consider the proposed public policy positions and changes, and distribute its report to the Association membership at least sixty days prior to the Annual Business Meeting.

The attached proposed changes to NASBE public policies were received in the Board Office on August 13, 2007. The Annual Business Meeting will be on October 13, 2007.

Illinois State Board Chairman Jesse Ruiz has appointed Board member Vinni Hall to participate in the NASBE Annual Business Meeting as the Illinois voting delegate.

At its September Education Policy Planning Committee Meeting of the Whole, the Board will discuss and recommend to the full Board the positions that Illinois will take in these matters.

Recommended Motion
The Illinois State Board of Education asks Dr. Vinni Hall to exercise her good judgment given the Strategic Plan and other positions of the Board when voting on the proposed changes of the Association’s Bylaws and Public Policy Statements at the upcoming NASBE Annual Conference.

Next Steps
Dr. Vinni Hall will attend the NASBE Annual Business Meeting on October 13, 2007, as the voting delegate for the Illinois State Board of Education.
Memorandum

To: NASBE members

From: Public Policy Committee

Re: Recommended Changes to NASBE’s Public Policy Positions

Date: August 6, 2007

In accordance with the Bylaws of the Association, the Public Policy Committee is reporting all new and amended Public Policy Positions recommended by the Committee to the full membership at least 60 days prior to the Annual Business Meeting. Attached are the proposed amendments and additions. Deletions are shown with overstrike (deletions), while additions are shown in bold with underline (additions).

This year’s changes occur in three areas, with the positions derived from the recommendations of NASBE’s three groups meeting last year: the National Commission on Financial and Investor Literacy; the Study Group on Creating High-Quality Early Learning Environments; and the Study Group on Civic Engagement and Ethical Behavior in a Global Society.

These amendments will be voted on by the Voting Delegates to NASBE’s Annual Business Meeting, which will take place in conjunction with the association’s Annual Conference at 2:15 pm, October 13, 2007 in Philadelphia.

Questions about the Public Policy Positions can be addressed to David Kysilko at NASBE at 800-368-5023, ext. 1111 or davidk@nasbe.org.

Thank you for your attention.

2007 Public Policy Committee

Joe Higgins, Chair (NE)
Mark Cluff (UT)
Lynne Farrell (CT)
Colleen Grady (OH)
Mary Jean Montgomery (IA)
Kathy Taft (NC)
Karen Farmer White (PA)
Linda Zechmann (GA)
Section 1. SCHOOL IMPROVEMENT

C. Core Curriculum

All students should have knowledge and expertise in broad curricular areas, including:

1. Language arts, to include writing, reading, speaking, listening, literature, and communication;

2. Mathematics, to include quantitative reasoning, problem solving, and the use and comprehension of data;

3. Scientific literacy, with an emphasis on hands-on, experiential learning;

4. Technology, to include the use of technology to locate, analyze, and communicate information and understanding of the implications, both positive and negative, of technology for individuals and society;

5. Citizenship, to include American and world history, civics and civic engagement, economics, and geography and a global perspective, as well as the promotion of such values as service to others, the dignity of work, sensitivity to our multicultural society, and the responsibilities of democracy;

6. Fine Arts, to help young people develop their creative and critical abilities and understand the relationships between the arts, other disciplines, and society, and promote personal expression;

7. Health topics, to be taught using a comprehensive approach combining physical fitness and general health information with HIV/AIDS education, sex education, and substance abuse education; and

8. Knowledge of the languages and cultures of the world’s peoples and of the interdependence of all peoples. This study should begin in the early grades; one of the benefits of the early study of foreign language is the understanding it brings to the study of English.

9. Financial literacy, to include the concepts, knowledge, and skills that will provide students with a foundation for analyzing increasingly complex financial problems, with a focus on young people becoming knowledgeable consumers, investors, money managers, citizens, and members of a global workforce and society.
Section 5. STUDENTS

G. Preschool-Child Development Programs Early Learning Education Policies

Preschool child development programs have significant long term benefits for learning. Therefore, NASBE supports a wide variety of public, voluntary, and private arrangements for preschool development programs **backed by a statewide vision for high quality early education.** States developing preschool systems should consider having:

1. **Aligned, comprehensive prekindergarten through grade three early learning standards.** Core requirements and standards for programs and professional development should reflect the research on effective early learning and development and address the capacity of programs to deliver quality instruction.

   All publicly funded programs should provide: parental involvement and support, screening and treatment for health and special needs; developmentally appropriate curriculum and teaching; and continuity between preschool programs and primary instruction.

2. **Accountability based on a continuous improvement approach that includes ongoing evaluation to assess a program’s plan for meeting early learning needs, the quality of its implementation, and its impact on children and families.** Accountability systems should use multiple age-appropriate indicators of both how children are progressing and the quality dimensions of classrooms so that needed improvements and professional development can be identified.

3. **State standards for teachers and preparation programs should require early childhood education teachers to have a Bachelor’s degree and specialized early childhood training at the college level consistent with a common vision of high-quality early education.**

   State Boards should provide leadership to ensure that teachers and other staff possess the training, licensing, and credentials and/or certification to meet the unique educational, social and emotional needs of preschool children.

4. **Plans for increasing access to high-quality preschool programs, beginning with children from low-income families.**
Section 5. STUDENTS

T. Civic Engagement and Ethical Behavior in a Global Society

Promoting civic engagement in our schools and among our students is fundamental to preserving our traditional American values of self-government and our leadership among nations. NASBE encourages states to reinvigorate citizenship education by ensuring that students have the knowledge, skills, and disposition to engage effectively in their rapidly expanding worlds by:

1. **Incorporating civic learning into standards, pedagogy, assessment, and accountability policies whenever possible.**

2. **Encouraging schools to work with community organizations to offer experiential opportunities that are relevant to students’ everyday lives and to academics, as well as encouraging experiential learning through extra-curricular activities; and**

3. **Encouraging educators to include ethical discussion and lessons throughout the school day.**
TO: Illinois State Board of Education
FROM: Christopher A. Koch, Ed.D., State Superintendent of Education
       Rene Valenciano, Assistant Superintendent for Educational Programs

Agenda Topic: District Consolidated Plans

Materials: None

Staff Contact(s): Gail Lieberman and John Perkins

Purpose of Agenda Item
The purpose of the agenda item is to inform Board members of the status of a major initiative regarding consolidation of required plans.

Relationship to/Implications for the State Board’s Strategic Plan
This initiative aligns with GOAL 3, Expanding Data-Informed School Management & Support Practices: To support the utilization of data to assist school districts in providing effective operational practices, opportunities to share pooled services, and flexibility in balancing their budgets to increase educational outcomes.

Expected Outcome(s) of Agenda Item
The Board will be better informed of agency efforts to consolidate required planning and potential related activities.

Background Information
The State has increasingly used data over time for local and state-level decision-making. One of the ways of increased data use has been the Interactive Illinois Report Card (IIRC), complementing the Illinois Report Card. The IIRC was created by Northern Illinois University, and subsequently has been funded in part by the agency. With additional requirements from state and federal law, the IIRC effort was expanded to create an on-line School Improvement Plan (SIP) and the District Improvement Plan (DIP). Those systems are now in full operation.

A recent addition to the District Improvement Plan has been a District Plan which uses the results of the assessment for English Language Learners, addresses the needs as indicated by their Annual Measurable Achievement Objectives (known as AMAOs), and outlines necessary local action.

There was dialogue in 2006 with the IIRC to add in the Technology Integration Plan, known as the TIP (as required of all districts and all e-rate users), into the SIP and DIP process. The dialogue did not result in a functional plan so the work by districts and at the state level in 2006-07 used a paper process. Additional dialogue and intense work by NIU with agency staff has resulted in a TIP that rolled out at the Superintendent’s Conference on September 7, 2007.

The TIP is being field-tested now. It will be used as is for workshops this fall with school districts which need to complete their district technology plan and submit same by April. It will be available on-line and “live” as of mid-October.
The Agency has begun the process of reviewing the possibility of expanding and improving the integration of required application and reporting information across all Federal and state programs. The goal of this initiative is to reduce the degree of redundancy and magnitude of required information from schools participating in several Federal and state programs in any given year. A committee has been assigned to examine the feasibility of connecting a school-based information format to program application and reporting requirements. This committee is comprised of Dr. Cynthia Heidorn, Superintendent, Mundelein Elementary # 75, Mr. Brad Cox, Superintendent, Tri Valley District #3 and Dr. Sue Ireland, Director, Eisenhower Special Education Cooperative in the South Cook area.

The committee’s initial meeting was Wednesday, August 29, 2007, with recommendations for the State Board of Education to:

- review existing requirements for application and reporting within all state and Federal programs, and
- identify and create a new planning and reporting infrastructure to reduce redundancy and strengthen program effectiveness by aligning ISBE and district-level priorities to improving student learning.

Elements of this process to include:

- the identification of common requirements across programs,
- the identification of relevant components of effective improvement practices,
- review existing legislation and ISBE Rules, review timelines for reporting to assure year-specific data, and
- review existing technical capabilities to accommodate a revised electronic system for planning and reporting.

Our plans for the fall are to integrate the TIP, SIP and DIP to the degree possible. Some items are the same, such as data analysis, but others are clearly different, like the technology inventory. Once an item is put into the plans, such as the number of PCs or their conclusions regarding the student demographics, it is carried forward into other areas of the reports.

Additionally, we have begun the process of further integration of planning across state and federal programs.

**Analysis and Implications for Policy, Budget, Legislative Action and Communications**

**Policy Implications:** This work should improve communications and reduce duplications at the local and state level. There may be a need for future dialogue as the process continues to roll out. The Board will be kept apprised.

**Budget Implications:** There will be a need for sufficient human and technical resources to support the systems as designed and as implemented over time.

**Legislative Action:** None at this time.

**Communication:** Periodic articles in the *Superintendent’s Bulletin*; discussion at appropriate statewide meetings.

**Pros and Cons of Various Actions**
On the pro side, joint planning throughout local districts and at the state level is to everyone’s advantage from a communications and reducing duplications perspective. We believe this will be less time-consuming in the long run, even if the screen shots when printed out may seem voluminous. Not all screens are used by all districts, and even if a particular screen is used it may be done quickly.

On the negative side, for those larger districts with many staff having distinctly different program area assignments, it will require more coordination than the previous separate plans have required. This too could ultimately be a positive result rather than a negative one.

**Superintendent’s Recommendation**
As this item was informational regarding consolidation of required plans, there is no need for Board action at this time.

**Next Steps**
Staff will continue to work internally on this initiative. There will be continued work with the Interactive Illinois Report Card staff at Northern Illinois University. There will also be continued dialogue with the field.
TO: Education Policy Planning Committee of the Whole

FROM: Christopher A. Koch, Ed.D., State Superintendent of Education

Agenda Topic: Illinois College and Workforce Readiness Partnership
Phase III: Targeted Interventions

Materials: PowerPoint to be presented during plenary session

Purpose of Agenda Item
The purpose of this agenda item is for a presentation of the status of Phase III of the Memorandum of Understanding for the Illinois College and Work Readiness Partnership.

Jonathan Furr and Elliot Regenstein of Holland & Knight and William Guenther, Rich O’Neill, and Julie Corbett, of Mass Insight Education will be in attendance for this discussion.
Introduction

- Purpose of This Report and Presentation
- Process to Date
- Summary of Findings

- Turning Around Under-Performing Schools
- Strengths and Challenges in Illinois
- A Vision for an Achievable, Effective Illinois Intervention System
As discussed in the MOU, our goal in this series of presentations is to provide a preliminary review of the extent to which Illinois policies are aligned with college and work expectations, particularly with regard to standards, data systems, and interventions in underperforming schools and districts, and to provide the Board with options for discussion and action.

In this presentation, we will focus on targeted interventions in chronically underperforming schools.

We will try to help the Board define its goals, and then define what it will take to achieve those goals – the process steps, and the real cost in time and money.

We will frame some of the critical policy choices to be made, and present options that build on nationally emerging consensus areas and best practices.

Once a basic direction has been set, the process will evolve, to help all of the interested parties come together to craft solutions that really work.

Over the next few months, we hope to help the Board develop a vision of what is possible – and then continue to work with the Board as its efforts move from “what” to “how.”
The Mass Insight Education & Research Institute is a nonprofit organization, founded in 1997, that is focused on improving student achievement in public schools through the effective implementation of standards-based reform.

Mass Insight will soon release a report entitled *The Turnaround Challenge: Why America’s best opportunity to improve student achievement lies in our worst-performing schools*. The report was underwritten by a major grant from the Bill & Melinda Gates Foundation.

Mass Insight’s role is to serve nationally as a catalyst for informed education policy and as an advocate for effective turnaround strategy and partnership-building (and not as a direct provider of in-school turnaround services).

Mass Insight’s leadership and staff have been actively engaged in Illinois over the last several months, in close collaboration with Holland + Knight.
As part of our initial review, we have reviewed national and Illinois resources, coordinated with national experts, and met with many leaders in Illinois government and advocacy, including representatives of:

- Office of Governor Rod R. Blagojevich
- Office of Senate Minority Leader Frank C. Watson
- Office of Speaker Michael J. Madigan
- Office of House Minority Leader Tom Cross
- State Superintendent Dr. Christopher Koch and key staff
- Illinois Association of School Boards
- Illinois Association of School Administrators
- Illinois Principals Association
- Illinois Education Association
- Illinois Federation of Teachers
- RESPRO Directors
- Large Unit District Association
- Chicago Public Schools
- Illinois Math and Science Academy
- Illinois SAELP
- Illinois Business Roundtable
- Illinois Chamber of Commerce
- Chicago Community Trust
- Academy for Urban School Leadership
- Center for Urban School Improvement
- Chicago New Teacher Center
- New Schools Venture Fund
- Chicago Community Trust
- Chicago Public Education Fund
- The Joyce Foundation
- The Spencer Foundation
Background

The Meaning of Targeted Intervention in Failing Schools

- Targeted intervention in failing schools – the bottom five percent in terms of academic performance – is completely different from the kind of support that the state already provides to local schools. These schools need the state’s help the most, and simultaneously can provide leverage and models for deeper, more rapid improvement in the many schools that are struggling, but not yet conclusively failing.

- What the state does now is to support improvement. That is critical work that must continue. But in the schools facing the greatest challenges, something more is needed: turnaround.

- **What is turnaround?** A dramatic and comprehensive intervention in a low-performing school that produces significant gains in student achievement within two academic years.
Background

The Illinois Landscape

Many schools around the state have missed AYP for the last four years.

<table>
<thead>
<tr>
<th></th>
<th># Missing AYP last 4 years</th>
<th>% Missing AYP last 4 years</th>
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<tr>
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<td>24.4%</td>
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<td>Middle</td>
<td>69</td>
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<tr>
<td>Elem.</td>
<td>169</td>
<td>6.6%</td>
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Note: A full-page version of the map is included in the Board packet following this presentation.
Below are examples of 37 schools outside Chicago that all have showed extremely low academic performance in each of the last three years – for each school, in each of the last three years fewer than 50% of students met or exceeded state standards. The percentage of low-income students in these schools ranges from to 25% to 95%.

<table>
<thead>
<tr>
<th>School</th>
<th>Operating Expndtrs/student</th>
<th>% M + E 2004</th>
<th>% M+ E 2005</th>
<th>% M+ E 2006</th>
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<td>62</td>
<td>65</td>
<td>73</td>
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<td>21</td>
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% M + E: Percent Meeting or Exceeding State Standards
Background – the Illinois Landscape

What the Challenge Looks Like in Illinois

- Many of the lowest-performing schools in Illinois have extremely high poverty rates, and many have student bodies that are almost entirely minority – but not all schools with low and stagnant performance fit that profile.
- Below is a chart showing nine schools that all are near state averages in the percentage of low income students, or the percentage of minority students, or both.
- No school on this list has had 51% of its students meet or exceed state standards at any point in the last three years.

<table>
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<tr>
<th></th>
<th>% Low Income</th>
<th>% Minority</th>
<th>Operating Expenditure per Student</th>
<th>2004 % Meets + Exceeds</th>
<th>2005 % Meets + Exceeds</th>
<th>2006 % Meets + Exceeds</th>
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Source for all data on this page and the previous page: Illinois Interactive Report Card
## Summary

### What We’ve Heard: Perspectives on Intervention in Illinois

- Many people understand that for a certain subset of schools, a dramatically new approach may be needed.

- There is concern here (as in other states) about how targeted interventions might affect the prerogatives of local decision-makers. The prospect of “state takeovers” makes people nervous. It’s clear states need to take a partnership approach: one that couples accountability with adequate support.

- While there are real practical challenges to implementing a comprehensive new turnaround system, no organization we spoke with was unwilling to discuss how to overcome those practical challenges, if the potential end result is improved outcomes for our students most at risk.
Summary

What You’ll Hear Today: Main Points of This Report

- **The bottom 5% of schools have not shown that they can or will improve on their own.** Improvement strategies may produce results for many schools, but the bottom 5% of schools need something altogether different: turnaround. Continuing to do what we currently do for those bottom 5% of schools will simply not produce dramatic results.

- **Turnaround is a dramatic, comprehensive intervention** that produces significant gains in student achievement within two academic years, and which readies the school for a lengthier, subsequent process of transitioning into a high-performing organization.

- **Turnaround requires new approaches from the state, in partnership with districts.** It must include the three “C”s of effective turnaround strategy: changing operating conditions that can undermine reform, building turnaround capacity as a special discipline, and clustering turnaround schools together. It must be concentrated with sufficient intensity to accomplish its goals, even if that means limiting the number of schools served.
Summary

What You’ll Hear Today: Main Points of This Report

- Turnaround requires new roles and structures to implement the new approaches successfully.
  - Schools and districts need high-capacity, lead turnaround partners to help them design and manage the work and align all other outside providers around a common set of strategies.
  - States need turnaround management structures that have the same operating flexibility schools need to conduct turnaround effectively, and must foster the development of a vital resource – the lead turnaround partners.

- A state turnaround initiative must provide sufficient support and enough incentives – positive and negative – that school and district leaders actively choose to engage in proactive turnaround – on behalf of schools in the bottom 5% and other schools at risk of heading there. In this way, highly intensive turnaround in the poorest-performing schools can pave the way for broader impact across the state’s entire school intervention program.
The Opportunity

Illinois Is Well-Positioned to Proceed with a Solid Strategy

- Some policy elements, resources, and capacities are already in place for Illinois to develop an entirely new system.
- The State Board can play a critical role in setting the state’s direction.
- We know what does not work for those schools with the greatest needs, and Illinois has a golden opportunity to learn from the successes and failures of other jurisdictions to develop a new kind of strategy.
Turning Around
Under-Performing Schools
What is “Turnaround”? 

**Turnaround Is Dramatic Change**

- Turnaround is a dramatic and comprehensive intervention in a low-performing school that produces significant gains in student achievement within two academic years.

- Turnaround must also ready the school for the lengthier, subsequent process of transitioning into a high-performing organization on a sustained basis. It must include:
  
  - Significant changes to the status quo in a school;
  
  - Comprehensive attention to the students, teachers, and administrators in the building, providing supports for students, the right environment for teachers, and empowerment for administrators to make choices based on the needs of students and the turnaround plan; and
  
  - Clear goals for significantly improving achievement in a short time frame (two years).

- In other fields, “turnaround” is its own discipline. In education, it is not. While the term is disliked by some educators, we must acknowledge that in some schools, turnaround is what is needed.
What is “Turnaround”? 

Research Basis for Turnaround: What does not work

- We know conclusively that less dramatic, less comprehensive interventions do not work in these chronically under-performing schools.

- **Simply changing programs** alone (curriculum, assessments, PD, coaching) does not work. Comprehensive School Reform: 21 of 24 well-funded federal intervention programs did not lead to sustained, significant improvement in achievement. (American Institutes for Research)

- **Simply changing people** (and programs) does not work. Reconstitution strategies in San Francisco, DC, and elsewhere that replaced whole teaching staffs did not produce improvement.

- **Simply adding consultants** does not work. Washington is representative of the many states that send individual consultants (usually retired educators) out to spend 1-2 days per week in failing schools. That is not a strategy that is destined to bring about dramatic change.
What is “Turnaround”?

Research Basis for Turnaround: How Some Schools Are Working

- We are learning how high-performing schools serving high-challenge student populations are able to produce exemplary results. Their strategies are showing the way.

- **Prioritizing students’ readiness to learn:**
  - Extended school day, longer year
  - Discipline, engagement, close student-adult relationships

- **Enhancing and focusing staff’s readiness to teach:**
  - Shared staff responsibility for student achievement
  - Personalized instruction based on data, flexible time on task

- **Expanding school leaders’ readiness to act:**
  - Ability to make mission-driven decisions about people, time, money, and program
What’s Required for Effective Turnaround?

New Approaches: The Three “C”s of Effective State Strategy

- States should redefine the space in which turnaround work takes place, making it a “club” that district and school leaders appreciate for the support and authority it offers them. In this space are turnaround zones, where the state and districts would work together to:

1. **Change the Operating Conditions:** Change the rules and incentives governing people, time, money, and program.

2. **Build Capacity:** Build resources and human capacity in schools and lead partners for the specific discipline of school turnaround.

3. **Cluster for Support:** Organize turnaround schools in clusters by region, need, or type – where new conditions apply and states/districts create special capacity.
What’s Required for Effective Turnaround?

The 3 “C” Approaches Are a Comprehensive Strategy to Deliver:

- **Operating conditions that support, instead of inhibit, reform:**
  - Provide school leaders with sufficient authority to act over staff, time, budget, and program, in a framework collaboratively developed through structured negotiations with the state and unions.
  - Ensure teacher commitment and increased compensation in exchange for increased responsibilities and/or time.

- **Capacity among school leaders and turnaround partners to plan and implement turnaround successfully**
  - In turnaround zones, improve schools’ HR functions as part of an emphasis on *people* as much (or more than) *programs*. Provide incentives to draw more highly-skilled educators into these schools.
  - Build a new resource base of lead turnaround partners to guide the work.
  - Ensure district capacity for implementation of turnaround plan, which may include direct district-level interventions and/or training in turnaround skills.

- **Clustering of schools in ways that support their turnaround plan**
  - Group schools into vertical (by feeder pattern) or horizontal (by school type or student need) clusters, served by lead turnaround partners.
  - Create some zones that are entirely within a district, while others cut across district lines (e.g.: high schools serving at-risk students and dropouts).
What’s Required for Effective Turnaround?

New Structures to Enable Successful Implementation

- **Lead Turnaround Partners:** Schools would be selected for turnaround because the district has been unable to bring about sufficient improvement. The state does not have staffing capacity to engage directly in turnaround work. Therefore, turnaround requires the development of a new resource: strong, external, lead turnaround partners that can coordinate other providers and state-provided services, and work successfully with schools to meet state guidelines and achievement goals.
  - There is ample precedent for this turnaround partner model; schools currently contract with outside providers for everything from textbooks and staff development to assessment services and transportation.
  - Many schools do projects more than strategies, with too many overlapping and conflicting reform partners. Lead turnaround partners would act as systems integrators of the sub-providers.

- **State Level:** Turnaround requires the same flexible operating conditions at the state level that it does at the school level. Most state education agencies would want to maintain a turnaround team to lead the implementation of such a considerably different set of reform strategies.
What’s Required for Effective Turnaround?

“Old-world” vs. “New-world” Capacity and Roles

Schools undergoing improvement in most states are subject to fragmented, competing projects; a confusing array of providers and partners; advice from state-supported consultants or assistance teams; and mandates of various kinds from their district.

An improved turnaround approach would organize and align these supports, with the state and district collaborating to create the turnaround zone and the lead turnaround partner working with the school to align all providers around a coherent turnaround strategy.
The Role of State Policy in Leading Turnaround

Interventions are a Key Part of an Accountability Framework

- Intervention by the state in failing schools is typically the final step in a larger accountability framework.
- The state’s role is to establish expectations for schools, districts, and students; make determinations as to whether those expectations have been met; and then undertaking appropriate educational interventions for districts and schools not meeting those expectations.
- An effective state intervention system focuses resources not only to comply with state and federal law, but to achieve the state’s policy objective in maintaining an accountability system: ensuring a high-quality education for all students.
The Role of State Policy in Leading Turnaround

Interventions are a Key Part of the NCLB Framework

- As schools fail to meet NCLB for four or more years, districts are responsible for selecting and implementing corrective actions (year four) and restructuring options (year five, planning, and year six, implementation).

- NCLB places responsibility on the state for providing technical assistance to schools in improvement status and overseeing the responsibilities of districts. For districts in status, the state’s obligation is more direct – it must implement corrective action in districts that have failed to meet AYP for four years, and may implement corrective action for any district in improvement status.

- But NCLB has not had the catalytic effect on interventions that its framers intended. Why?
  - States, districts, and schools have gravitated towards the least intensive, least comprehensive reforms, using the NCLB Restructuring option that allows “other forms of major restructuring” – a phrase open to very wide interpretation.
  
  - NCLB’s timeline allows for seven years from first identification of a struggling school to the required implementation of a major intervention strategy.

  - States are facing an enormous change in the scale of schools heading down the accountability pipeline, because NCLB pushes schools into Restructuring that are only failing in student subgroups.
The Role of State Policy in Leading Turnaround

The Field’s Response to NCLB’s Options: The Less Change, the Better

Increasing comprehensiveness of change

- **Reconstruction**
  - Theory: staff is insufficiently skilled
  - NCLB Option 2

- **Contract Management**
  - Theory: change school management, along with program, people, conditions
  - NCLB Option 3

- **State Management**
  - Theory: state must assume control as district has abrogated its right to manage the school
  - NCLB Option 4

- **Charter Conversion**
  - Theory: best to circumvent entire system
  - NCLB Option 5

Conditions Change

- Governance Change
- Management Change
- People Change
- Program Change

Research found Conditions Change to be a crucial element for effective turnaround.

Popularity of choice is inversely proportional to the comprehensiveness of change.

CA: 93%
MI: 76%
MI: 28%
MI: 14%
CA: 61%
MI: 0%
CA: 0%
MI: 0%
The Role of State Policy in Leading Turnaround

The State’s Vital Role: Requiring (and Enabling) Real Turnaround

**Improvement**

**Turnaround**

**System Change (Conditions + Management & Governance as Required)**

**People Change**

**Program Change**

- **Revision**
  - Theory: program needs improvement
  - NCLB OPTION 5

- **Reconstitution**
  - Theory: staff is insufficiently skilled
  - NCLB OPTION 2

- **Superintendent’s Schools**
  - Theory: in-district turnaround zone that enables program, people, and conditions change

- **Contract Management**
  - Theory: change school management, along with program, people, conditions
  - NCLB OPTION 3

- **State Management**
  - Theory: state must assume control as district has sabotaged its right to manage the school
  - NCLB OPTION 4

- **Charter Conversion**
  - Theory: best to circumvent entire system
  - NCLB OPTION 1

**NCLB’s Missing Option: District-Managed System Change**

Some entrepreneurial school districts are pioneering a promising trend:

*Program change + people change + conditions change in turnaround zones with altered operating rules and new resources.
We label this option “Superintendent’s Schools.”*
What’s Required for Effective Turnaround?

A Comprehensive Turnaround Strategy

The complete state turnaround framework includes:

**Local Turnaround Zones**
Serving clusters of turnaround schools

**New Approaches:**
Changing conditions, Building capacity, Clustering for support

**New Structures:** Special turnaround expertise at the state level, in district offices, and among the lead turnaround partners in the resource base of providers
The Role of State Policy in Leading Turnaround

Which States Are Close to This Ideal Framework Right Now?

- Answer: none. States have lagged behind a few large-city districts in creating and implementing coherent, comprehensive turnaround strategies.

- States to examine for partial solutions include:
  - Massachusetts: 10 essential elements required of all turnaround plans, passed into state policy last fall.
  - Virginia: turnaround specialists program recognizes the need to develop principals with special expertise in turnaround.

- Districts to examine for partial (and still developing) solutions:
  - Miami-Dade: centrally controlled district zone for 39 schools.
  - New York: voluntary empowerment zone now open to all principals by choice.
  - Chicago: offers range of turnaround approaches.
Strengths and Challenges in Illinois
What is the Existing Infrastructure in Illinois?

Illinois Currently Has a School Improvement System

- Illinois schools currently have options for seeking voluntary improvement.
- Regional offices and intermediate service centers work directly with school districts.
- The RESPRO Centers are able to make a real difference in some schools, and are an essential part of Illinois’ school support continuum.
- There are some useful models and strategies in place for professional development, and increased attention to the need for professional development in recent years.
- The school improvement system is now and will continue to be an essential part of the continuum of services provided by the state, but it cannot be the whole continuum.
Strengths for Illinois to Build On

The FY 08 budget includes funds for targeted interventions, supported by the Governor’s Office and the General Assembly.

While no budget implementation legislation has passed, the language in filed legislation suggests a new approach to targeted intervention.

The State Board has a demonstrated commitment to dramatic action when communities have schools in significant difficulty (Calumet Park).

There is a growing network of support from non-profits and professional organizations focused on improving education.

The education advocacy groups representing the people working in schools are prepared to discuss a more dramatic system of intervention.
Challenges Illinois Must Face

Creating Successful Turnaround Will Require Major Change

- Staff and resources are currently limited.
- There are not enough positive incentives for schools to engage in major change.
- There are not enough negative incentives for schools to engage in major change.
- There is not enough support for vital human resources improvements in low-performing schools.
- There is not enough support for changing operating conditions in turnaround schools.
- There is not enough effort made to band schools together in turnaround clusters.
- The loose-tight balance is off; the dynamic in improvement is almost totally loose.
- There is not enough effort made to provide external capacity for turnaround assistance.
- The state’s public, private, and advocacy sectors have not made a high-visibility and sustained commitment to the issue.

*These challenges are real and significant – and they are common across states. Illinois has a chance to lead the nation in confronting them.*
A Vision for an Achievable
Illinois Turnaround Model
## Developing an Illinois Turnaround System

### Four Key Steps

1. **Step One:** Focus existing resources on creating the strategy and exemplar clusters of turnaround schools.

2. **Step Two:** Create protected space for turnaround schools and an attractive choice for fundamental change.

3. **Step Three:** Build a new resource base of external partners with the capacity to help turnaround schools succeed. Pair this new resource base with targeted capacity-building for district and school leaders (particularly principals) engaged in turnaround.

4. **Step Four:** Create a special turnaround team at the state level, with sufficient management flexibility to organize and implement the work.
Developing an Illinois Turnaround System

Step One: Focus existing resources on creating the strategy and exemplar clusters of turnaround schools

- Focus on the bottom 5% of schools, prioritized based on the number of consecutive years the school has not met AYP, the overall percentage of students failing to demonstrate proficiency, and the lack of progress under current state assistance and intervention programs.

- In the bottom 5% of schools, the case is strongest for a dramatic change in the status quo.

- Begin small, focused, high-intensity efforts in those schools. Experience to date with turnaround initiatives suggests that costs in the range of $250,000 to $1 million per school per year in the first three years, some of which will be Title I federal funds.

- Create process designed to identify and select school partners that are ready for real change and have sufficient consensus locally to get started quickly, using additional resources provided by the state.

- State should create a club that schools in the bottom 5% would want to join.

- At the outset, the state should focus its resources on those schools where the elected leadership and collective bargaining unit are interested in using the additional resources as a lever for change.

- Those schools that do not participate voluntarily at the outset must be made aware that if their performance does not improve, the state may intervene involuntarily.
Developing an Illinois Turnaround System

Step Two: Create protected space for turnaround schools and an attractive choice for fundamental change through school turnaround zones

- Pilot turnaround schools will have to meet specific requirements, potentially including:
  - Curriculum aligned to state standards;
  - In-year formative assessments and end-of-year summative assessments to direct instruction and student-level interventions, and use of these assessments for data-driven decision-making;
  - Extended time and a strategic plan on how to use it effectively; and
  - For high schools, personalized focus for 9th graders and “off-track” students, and strategies linked to feeder middle and elementary schools.

- Turnaround plans must include a process that ensures an appropriate level of involvement for all essential local constituencies.

- Turnaround plans must address changes in operating conditions needed to permit successful implementation, including creating a leadership team with sufficient authority over personnel, budget, scheduling, and program choices.

- Turnaround plans must address school’s capacity needs, including identification of a lead turnaround partner that meets the state’s criteria for acceptability and participates in the planning process.

- Turnaround plans must prioritize the development of a collaborative, professional teaching culture at the school.

- Turnaround plan must incorporate expanded collaboration with social service, community, and other organizations that typically serve student populations attending under-performing schools.
Developing an Illinois Turnaround System

Step Three: Build a new resource base of external partners that have the capacity to help turnaround school clusters succeed

Schools need strong outside partner organizations to collaborate on producing and implementing the turnaround plans.

The state must ensure that districts have the capacity they need to work effectively with outside partners, and that those outside partners have the right level of autonomy and authority. The state must also ensure accountability of lead partners.

Lead partners would work with clusters organized in various ways that serve the needs of the schools (as shown at right).
Developing an Illinois Turnaround System

Step Four: Create a senior-level state turnaround team

- Turnaround requires new approaches (and consequently new structures) at the school level, the district level – and at the state level. The same authority and flexibility to make mission- and outcome-driven decisions that characterizes high-performing, high-poverty schools needs to characterize the state’s management of a turnaround initiative.

- A special turnaround team, with senior leadership, could be charged with managing the implementation of the state’s turnaround initiative and given sufficient management flexibility to undertake the work successfully. Responsibilities of the state, as administered through the turnaround team, would include:
  - Establishing the pilot group. Selecting a small, initial pilot set of turnaround schools and helping to develop two to three prototype turnaround clusters.
  - Establishing turnaround criteria. Establishing the criteria that all turnaround plans must address, and ensuring that plans meet the criteria before the state approves the plan and implementation begins.
  - Implementing conditions change. Overseeing and guiding the changes in rules and regulations governing the work within the turnaround schools to bring about operating conditions supportive of reform, and working with local decision-makers (superintendents, principals, teachers, union leaders, school board members) to facilitate their adoption.
  - Distributing targeted resources to drive specific improvements in schools, and ensuring that local districts are also providing adequate resources to support targeted schools.
  - Supporting the development of vital capacity. Establishing a process to select and manage lead turnaround partner organizations, building off of existing capacity in the state, to engage with schools and districts in the management of the turnaround clusters.
  - Supporting the effectiveness of cluster design, and ensuring that districts, schools, and partners make effective use of state services in support of the turnaround plan.
  - Monitoring performance and ensuring fidelity to the turnaround plan. Monitoring school performance against objective goals, and serving as the final decision-maker whenever the lead turnaround partner believes a school or district action is inconsistent with the turnaround plan.
Developing an Illinois Turnaround System

Vision for the Next Five Years

- After one year
  - State Board has adopted policies consistent with these recommendations
  - Districts in pilot clusters have been identified, with turnaround plans developed and budgets in place
  - Significant steps toward developing turnaround leadership development
  - Lead turnaround partnership organizations are operating in some schools and developing elsewhere

- After three years
  - Initial successes after two years have led to increased state investment, enabling more schools to take part
  - A broad array of schools across the state’s accountability-and-intervention continuum are actively seeking voluntary participation in the program to gain the benefits of protected turnaround zones
  - Mature lead turnaround organizations work effectively with school partners
  - The state has developed the capacity to implement the turnaround model on an involuntary basis for schools that have rejected the voluntary approach but that have critical needs
  - Components of the turnaround model are informing the state’s methods of providing assistance to schools throughout the entire continuum of support

- After five years
  - Continued state investment serves an increased number of schools, while some have graduated out of the program
  - More schools serving disadvantaged populations producing achievement outcomes that rival much more affluent schools
Final Takeaways
Critical Takeaways

- The current system will not produce change in the lowest-performing schools.

- The leaders of turnaround schools must have resources, know-how, and authority to succeed. If they do not have each of those elements during and after the turnaround process, their schools will continue to produce poor academic results.

- All of the elements identified in this plan have been implemented in schools and shown success or promise, but no state has packaged them together into a comprehensive system.

- In many schools where these elements have been implemented, it has been done with the cooperation of school boards, superintendents, principals, teacher unions, and other staff. The same level of cooperation is possible here.

- By implementing the right supports and incentives, Illinois can become a national leader in transforming the lowest-performing schools into high-performing schools.
**Chicago and Cook County Not Making AYP**

**Chicago Public Schools:**
- 57 High Schools - HS (70)
- 0 Middle Schools - MS*

144 Elementary Schools - ES (486)

**Remainder of Cook County Public Schools:**
- 25 High Schools - HS (57)
- 14 Middle Schools - MS (114)
- 11 Elementary Schools - ES (427)

*Most Chicago Elementary Schools are K-8.