

STRATEGIC MANAGEMENT OF HUMAN CAPITAL - BOSTON -

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7. New York City

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8. Teach For America
9. The New Teacher Project
10. New Leaders for New Schools

This paper is available in the Resources section of <http://www.smhc-cpre.org>.

October 2008

The research reported in this paper was supported by grants from the Carnegie Corporation of New York (Grant No. BD07164.R02) and the Bill and Melinda Gates Foundation (Grant No. 49915) to the Consortium for Policy Research in Education at the Wisconsin Center for Education Research, School of Education, University of Wisconsin-Madison. The opinions expressed are those of the authors and do not necessarily reflect the view of the Carnegie Corporation of New York, the Bill and Melinda Gates Foundation, the institutional partners of CPRE, or the Wisconsin Center for Education Research.

STRATEGIC MANAGEMENT OF HUMAN CAPITAL IN BOSTON¹

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Boston Public Schools (BPS), founded in 1647, is the oldest public school district in the United States. Today, the district employs 5000 teachers in 144 schools serving approximately 56,000 students from diverse backgrounds: 41% are African American, 35% Hispanic, 14% White, 9% Asian/Pacific Islander and 1% are multiracial or American Indian. One challenge facing the district is steadily declining enrollment. Of the 77,000 school-age children in Boston, 27% (or about 20,000 kids) do not attend Boston Public Schools. Of these students, approximately 12,000 go to private or parochial schools, 3,000 go to suburban schools, and 4,500 go to public charter schools. Continuously declining enrollment has had a negative effect on Boston's \$750 million budget, with recent cuts (in March 2008) of 35 million.

Led from 1995-2006 by seasoned urban school superintendent Thomas Payzant, the district made substantial progress toward its goal of providing effective teaching and learning so that all students can learn at high levels. As one example of this achievement growth, from 1998 to 2004, the percentage of students passing the tenth grade math Massachusetts Comprehensive Assessment System (MCAS) on their first try went from 25 to 74%; improvement along the same lines on the English MCAS was 43 to 77%. In 2006, after 4 years as a finalist, Boston won the Broad Prize for Urban Education, which honors urban school districts demonstrating the greatest overall improvement in student achievement and progress toward the closing of the achievement gap.

The district is now led by Carol Johnson, former superintendent of Memphis and Minneapolis, who is in the process of implementing an acceleration agenda to help ensure that

¹ This case is based on a review of documents and interviews with superintendents, key central office leaders from the human resources, curriculum and professional development offices, and representatives from the teacher's union.

progress continues, the achievement gap is further narrowed, and effective teaching and learning take place in all of the district's schools.

1. BOSTON'S EDUCATIONAL IMPROVEMENT STRATEGY

The district's instructional improvement strategy, which was largely developed under Payzant, originally under the title of Focus on Children, includes seven essentials for whole-school improvement:

- 1) **The Core Essential: Effective Instruction** – Use effective and culturally relevant instructional practice and create a school climate that improves student learning, promotes student engagement, and builds on prior knowledge and experiences.
- 2) **Student Work & Data:** Examine student work and data to drive instruction and professional development.
- 3) **Professional Development:** Invest in professional development to improve instruction.
- 4) **Shared Leadership:** Share leadership to sustain instructional improvement.
- 5) **Resources:** Focus resources to support instructional improvement and improved student learning.
- 6) **Families and Community:** Partner with families and community to support student learning and engagement.
- 7) **Operational Excellence:** Maintain high levels of effectiveness, efficiency, and equity in our operations.

All of the core essentials include expectations for schools, a list of evidence of what one should see and hear in classrooms and around the school, and expectations for central administrators.

For example, the expectations for schools on the core essential of effective instruction includes a description of the inquiry-based approach that all teachers are expected to use, also called workshop instruction, which is organized in the following way:

- **Mini-lesson/Objective:** The teacher presents and models the day's learning objective – a standards-based fact, concept, strategy, or skill

- Independent Work: Individually or in small groups, students apply the learning objective to their reading, writing or other work and teacher confers with some of the students about the learning objective
- Share/Summing Up: The teacher sums up the learning objective, and students discuss how they used it in their work

Other expectations for teachers include differentiating instruction to ensure that the needs of the individual students are met and assigning work with high cognitive demand. These expectations, along with eight dimensions of effective teaching, form the basis of the district's explicit view of instruction. The dimensions of effective teaching are:

- 1) equity and high expectations;
- 2) professionalism;
- 3) safe, respectful, and culturally sensitive and responsive learning communities;
- 4) partnerships with family and community;
- 5) instructional planning and implementation;
- 6) content knowledge;
- 7) monitoring and assessment of progress; and
- 8) reflection, collaboration, and personal growth.

In addition, the district's professional development program reinforces these goals and helps teachers implement them.

Having a well-articulated instructional improvement strategy is important, but Payzant was also familiar with a truth that was articulated in the 2007 McKinsey report in this way: "The quality of an education system cannot exceed the quality of its teachers." Accordingly, the superintendent and his team worked to lay out a human capital strategy that would get the best

possible new talent and mid-career changers, take full advantage of these people for the 3 to 5 years most would stay, and get the best to stay longer term.

To accomplish these goals required two major undertakings: redesigning the HR department and reforming the teacher contract. Boston was notorious for being a difficult place to get a teaching job – because of multiple factors including seniority bumping; a poorly managed, paper-based application system; and a late hiring cycle – with most teachers hired in August, when many of the most talented new teachers had already accepted positions elsewhere. Those teachers who were hired often did not get paid because they had not been officially added to payroll. All of the human resource processes were paper-and pencil-based, the filing system was a mess, and there was no one point of contact for either new teachers or for principals trying to hire them. Principals had to rely on special relationships with people in the human resource department or show up in person in order to ensure that the paperwork was processed for the teachers they wanted to hire. As a result of these issues, Boston was missing the opportunity to hire the most qualified new teachers. There was also a too-limited supply of the kind of school leaders that the district needed to implement the instructional improvement strategy.

This case study tells the story of how the HR department at BPS went from being hamstrung by antiquated, bureaucratic processes and a restrictive teacher contract to being a helpful resource for prospective and current teachers and principals with more ability to positively influence hiring practices, and playing a critical role in helping the district fulfill its mission. It describes Phases I and II of the HR reinvention, including the priorities of each phase and the accomplishments. Discussion of this reinvention includes the many strategies Boston uses to recruit, select, place and train new teachers and principals, and how those strategies were implemented.

The overall case is divided into five sections, with this description of the overall instructional improvement strategy serving as section one. Section two describes the district's talent acquisition strategy, including its methods for recruiting, selecting and placing teachers and principals. This section also includes the changes in the teacher contract that were instrumental in the ability to implement the talent acquisition strategy, many of which required cooperation from the teachers' union to accomplish. Section three gives the story of how transactional improvements were made in the district's human resources department. Section four summarizes the district's approach to talent management, focusing on its efforts to develop and maintain talent through induction and mentoring, professional development, performance management and pay. This is another area the union has been involved in, particularly with mentoring programs. This section includes some of the steps the district has taken to remove teachers with unsatisfactory job performance. Section five concludes the case study with a summary of improvements that could be replicated elsewhere and a discussion of where the district is headed in terms of its strategic management of human capital.

2. THE CHANGED NATURE OF TALENT ACQUISITION IN BOSTON PUBLIC SCHOOLS

To implement the powerful instructional improvement strategy they had created, BPS leaders needed top talent in terms of both teachers and principals. This recognition prompted the district to make a number of changes, most of which fell under one of the following Phase I HR Reinvention priorities: earlier teacher hiring, greater teacher quality, and diversity and critical needs recruiting. To accomplish these goals, the district began to more actively recruit minorities, started grow-your-own programs for teachers and principals, and negotiated changes to the teacher contract to make it more supportive of the new talent acquisition strategy. This

section describes the shift to a more proactive, talent-focused recruitment strategy, as well as pertinent changes to selection and placement practices and the teacher contract.

Recruitment

Because this case study examines recruitment practices for both teachers and principals, where appropriate, the subsections are further divided into two, one for teachers and one for principals.

Teachers

Boston hires about 600 teachers every year, for which it receives an average of 60 applications per position. (Many people apply for more than one position, so there are fewer applicants than the total number of applications.) Of those 36,000 applications only about 65% come from licensed applicants, and the district receives significantly fewer applicants for jobs in high-need areas (mathematics, science, special education, English language learners) – only 13 people apply for each available job in these areas as compared to 60 in other areas. Boston also receives fewer applications from minorities – 16% of the total number of applications, or 5760, come from African Americans and Hispanics. The district hires approximately 12-15 principals each year, and receives a total of about 100 applications.

These statistics translate to a reality surprisingly similar to that of many urban districts – it is not difficult in general to recruit candidates to teach in Boston Public Schools.

Though the conventional wisdom is that it is hard to find talented individuals for urban districts, many new teachers desire an urban education experience. When this desire to make a difference is combined with the higher starting salary in Boston compared to those in surrounding communities, working at BPS becomes even more attractive. According to a report by the BPS Human Resources Department, when compared to the 19 school districts in the Boston

metropolitan area, BPS teachers were paid, on average, \$9,877 or 17% more than these comparison districts in 2004-05. When compared to 11 school districts where the average student poverty level was similar to Boston's (greater than 60 %), the average BPS teacher salary was greater by \$12,936 or 24% in 2004-05. For example, in 2005-06, the starting salary for a teacher with a bachelor's degree and no experience in Boston was \$42,355, compared to \$37,732 in Cambridge, and in 2006-07, the starting salary in Boston was \$43,000 compared to \$39,910 in Newton.

However, it has been difficult to find sufficient applicants of high-quality who are African American or Hispanic, and it has also been difficult to find sufficient high-quality candidates in four content or specialty areas: mathematics, science, special education, English language learners (ELL). Because of these issues, BPS has become more proactive in its recruiting process to increase the number and quality of applicants in these areas.

For example, in 2006-07, the district set a goal that 25% of its applicants and 35% of its new hires would be teachers of color, but received only 16% of their applications from candidates of color and were able to hire only 23%. Because of the difficulty of meeting this goal and the priority placed on hiring minorities in BPS, the district has a multifaceted strategy in place to help meet this goal.

More active recruitment for minority teachers. One piece of the strategy is more active recruiting of all candidates in high-need areas. This means recruiting at universities with greater concentrations of minority students, such as Historically Black Colleges and Universities (HBCUs) such as Morehouse, Howard, Spellman and Clark for minority candidates and the University of Puerto Rico for native Spanish speakers. Another piece of the strategy is to attend

conferences and career fairs specific to high-need areas. The district also advertises on teacher websites, emphasizing the opportunity to make a difference by working in urban public schools.

When, through these methods, district administrators find a promising candidate in a high-need area, they now have the ability to offer a contract even before the formal hiring process has taken place. This practice, started in 2005 under former HR director Barbara McGann, allows the district to act quickly when it encounters highly qualified applicants for high-need areas, rather than having to wait to go through all the channels that may take place over the course of several months, increasing the likelihood that the candidate will take a job in another district.

Altering the teacher contract to facilitate earlier hiring. During the period leading up to the 1997-2000 contract, other changes to the hiring process were negotiated with the Boston Teacher's Union, including the end of practices known as voluntary excess and blind bids, a compressed hiring timeline, and the start of a practice called open posting. All of these changes have enabled BPS principals to hire high-quality teachers that fit into the school's particular culture.

Blind bids were particularly disruptive to schools trying to staff themselves strategically in order to improve instruction. They involved a process whereby senior teachers could put in a bid at another school even if there were no current openings. When a position came open, the most senior teacher with a bid on file automatically got the position; neither HR nor the principal could intervene in the process. In some cases, the principal did not even get to meet the teacher until right before the school year started in August. The district successfully negotiated an end to blind bids in conversations regarding the 1997-2000 contract.

Since one of the priorities of the HR reinvention was earlier teacher hiring, during the negotiations for the 2000 contract, Payzant worked with then BTU president Edward Doherty to agree on a compressed timeline. Prior to these negotiations, the voluntary transfers began in March, followed by the reassignment of teachers in the excess pool in April. The excess pool includes teachers who are returning from leave, teachers whose positions have been eliminated, and until the end of voluntary excess, teachers who were leaving one school to avoid a negative evaluation. This transfer and excess process was time-consuming, which meant that schools could not begin to seek outside applicants until June 1. As a result of the negotiations, the transfer process began in February rather than March, which helped move up the time to contact outside candidates.

The union also made an agreement with the district that teachers with a provisional contract could remain in the same school if the principal decided to keep them. This was a significant change in the teacher contract, because prior to that time, if a more senior teacher wanted into that school, the provisional teacher could be transferred.

Another significant change, and one that allows a sidestepping of the process described in the previous paragraph, is open postings. Open postings are a particular type of hire that give principals the ability to post their openings early, before the official, seniority-dominated transfer process takes place, allowing them more choice over which teachers they hire for their schools. Open postings are possible because of a clause in the BTU contract that specifies that principals can use the open posting process if the faculty approves, the position requires extra duties, and the teacher receives at least \$1250 above the normal negotiated salary for duties such as tutoring after school. District leaders, seeing the advantages of open postings for principals, encourage

them to write all teaching openings so that they qualify, and now 8 out of 10 positions that are posted are open postings.

Also as a result of these changes, more vacancies are posted by February. The union president commented that this change gave principals new flexibility, and district leaders noted that it means more vacancies are filled by July 1. This includes new teacher hires, which were notoriously late prior to 2006.

While all of the strategies mentioned above greatly aided the district in its quest to fill all of its teaching positions with high-quality candidates and ensured that a proportional number of new teachers were minorities, the district was still experiencing a shortage of applicants who were minorities and a general shortage of applicants prepared to work in the urban environment. This was the problem identified by the district as one of its most intractable and therefore one that it made sense to direct private funds toward solving.

The Boston Teacher Residency Program. As a result, in May of 2003, the Boston Teacher Residency (BTR) Program began, funded by Strategic Grant Partners, a relationship that was facilitated by the Boston Plan for Excellence. The Boston Plan for Excellence (BPE) is a local education foundation that works in close partnership with BPS to refine professional development for teachers and principals and improve instruction in classrooms. One of the roles of BPE is to test promising new practices to solve problems in the district, and it was this role that they were fulfilling by enabling the development of the Boston Teacher Residency Program.²

² For a comprehensive description of BTR, see Berry, Barnett, Dianne Montgomery, Rachel Curtis, Mindy Hernandez, Judy Wurtzel and Jon Snyder. (2008). *Creating and Sustaining Urban Teacher Residencies: A New Way to Recruit, Prepare, and Retain Effective Teachers in High Need Areas*. Washington, DC: Aspen Institute and National Center for Teaching Quality.

BTR is a district-based, pre-service teacher training program with a stated mission to recruit, prepare and sustain excellent teachers in and for the Boston Public Schools. After its first year, 2003-2004, it prepared a cohort of 12 teachers, which increased to 36 for 2004-2005, 48 in 2005-2006, 58 in 2006-2007, and the potential for 84 in 2007-2008. As the cohorts got larger, the district assumed a larger share of the responsibility for funding the program. For the 2008-2009 school year, the district is expected to pay 61% of the costs of BTR, but because the district had to cut 12% of its budget in March of 2008, there was uncertainty about whether it would be able to make the full payment. However, at the last minute, Mayor Menino came through with some extra money. At that time, BPS leaders, recognizing the value of BTR, made some difficult decisions to cut from other areas so they would not have to scale back BTR. They made cuts to central office staff, the budget and operations department, transportation, facilities – basically anywhere they could possibly trim, they did, so that BPS could meet its obligation and not have to scale back BTR. This is just one example of how advantageous it can be to have school district function as part of the city budget, particularly when the mayor is a strong proponent of public schools. Menino is a vocal champion of Boston Public Schools – he is himself a product of the system, his children went to public schools in Boston, and now he has grandchildren in the system.

BTR is highly selective in who it invites and selects to participate, recruiting talented and committed individuals with diverse backgrounds who desire to be urban teachers. Once accepted, they spend 4 out of 5 days in a classroom working with a mentor teacher, and 1 day as a cohort in the classroom learning from a curriculum tailored to BPS's reform agenda. Residents earn a Massachusetts Initial Teacher License in their primary academic content area, partial credit toward dual licensure in special education, and a master's degree in education from the

University of Massachusetts-Boston. Residents do not have to pay any tuition and receive a stipend of \$11,000 to help cover their living expenses.

One might wonder why BPS, situated so close to so many excellent universities and colleges, would need to start its own program. It did so because the post secondary institutions were slow to engage with the district on how they could help prepare the kind of teachers (and leaders) that the district needed. Thus far, the district and BPE are pleased to report that offering this program has led to outcomes such as more talented new minority teachers, teachers who stay longer, and more math and science teachers – all needs the district had before BTR was in place that were not met by other institutions of higher education.

The statistics on new teacher hires reflect BTR's success at training more minorities to work in Boston Public Schools: 32% of Boston Teacher Residents are teachers of color, as compared to 23% of new hires overall. In general, BTR is very concerned about tracking how well its recruits do and how long they still in the district (they are required to stay 3 years), and this information is shared with the district.

Recruiting early career changers. In addition to this training program, the district runs a less-intensive program called Emerging Teachers in a partnership with the Bell Foundation. This program started in 2006-2007 with two cohorts, a professional cohort and a summer cohort. It is intended for people working and looking at shifting careers, and gives exposure to Boston and exposure to teaching. The summer cohort is for non-education undergraduates, allowing them to spend time in the classroom and be exposed to classroom management. About 35-40 teachers have gone through both programs, and they hope to grow the summer cohort to increase this as a pipeline for BPS.

Other recruitment initiatives. Some districts grappling with similar pipeline issues are using teachers recruited by organizations such as Teach For America (TFA) and The New Teacher Project (TNTP). Although Payzant considered using TFA teachers during his administration, the district has no current partnership with that organization. However, Carol Johnson is planning to bring in about 20 TFA teachers in September of 2009.

One additional strategy that district leaders use is to reach out to more experienced teachers by mining the data on the Massachusetts Department of Education website, which allows them to find teachers who are already licensed and have some initial experience, making them more effective in the classroom than brand new teachers. The district's comprehensive strategy, involving active recruitment of new hires, proactive posting of positions by principals, grow-your-own teachers and recruiting teachers with experience, illustrate that BPS knows the importance of getting talented teachers to work in their schools and has mounted several initiatives to make that a reality.

Principals

Most school leaders in the Boston Public School District come from within the district; Payzant estimates that only 5-8% come from outside. For outside candidates, the district recruits principals in a number of ways. First, it uses conventional means of recruiting, such as reaching out to various organizations (and their websites) including the Association of Elementary School Principals, the Association of Middle School Principals, the Association of High School Principals. They also advertise on the Massachusetts Department of Education Website and in Education Week as well as other publications. To reach minorities, district recruiters sometimes attend conferences of associations like the National Association of Bilingual Educators and the

National Association of Black School Educators. Ideally, advertising begins in December for the following school year, although in 2008 it did not begin until March.

Exploring school administration in Boston. In addition to the methods mentioned above, the Boston Public School System has a two-pronged strategy for recruiting principals: the Exploring School Administration in Boston (ESA) program and the Principal Fellowship Program. The Exploring School Administration program is a less intensive program in terms of time and resources, but it has been very successful at increasing the pipeline for new school leaders in Boston. Between 40 and 60 people per year attend this program, which runs from October to March and offers a series of 10 after-school seminars intended to expose potential school leaders to the role of principal as instructional leader. Each seminar focuses on a different aspect of the school leader's role, and speakers at the seminars include current principals, the superintendent and her senior leadership team, and school-community partners. Participants are exposed to the potential power of school leadership to improve instruction and student learning. The program, open to those with knowledge of instruction and leadership potential but without school administration experience, provides an opportunity for the district to recruit promising participants into school leadership and is thus a beginning stage of a pipeline for new principals. The only admissions requirement is that participants attend all sessions.

The Boston Principal Fellows Program. Another way that the district ensures that it has the school leaders it needs is through its grow-your-own Boston Principal Fellows Program. This program, based on the New York City Leadership Academy model, is highly selective, with a very rigorous application process. About 100 people apply to be Boston Principal Fellows, and to do so they have to write two essays. This paper screening culls the group down to about 50 prospective Fellows, at which point they come to BPS on a Saturday in groups of 25 and go

through a series of activities that help BPS recruiters discern the skills that the applicants would bring to the program. At this stage, another 25 are eliminated, and the remaining 25 come to the district office again, this time to meet with academic superintendents. These intense interviews last 2 hours, and after that process is complete, between 8 and 12 applicants are recommended as Fellows.

Those accepted begin a yearlong residency in the Boston Public Schools, for which they receive a comparable salary, which means they are paid what they would have been paid in the position they left in order to be in the program. Offering comparable salary is an important way of ensuring diversity of Fellows – it is not just those who can afford to take a year off and go back to school who can participate in the program. Participants are then assigned to a school with an experienced school leader in place from whom they can learn on the job. Between August and June, participants spend 4 days a week in their assigned school and 1 day a week in the classroom with their cohort. Because having a master’s degree is a licensure requirement for becoming a principal or headmaster (Boston’s term for high school principals), the program was designed in such a way that participants can earn a master’s degree from UMASS-Boston after the completion of the coursework. In order to reach the required number of hours, participants spend an additional 2 weeks in the classroom beyond the 1 day a week during the school year. The coursework emphasizes the specific urban needs and challenges of Boston Public Schools, including closing the achievement gap, supporting family and community engagement in schools.

At the end of the fellowship year, participants are highly recommended for placement in the district. About one in three fellows moves into a principalship for the following school year. Others become assistant principals first. In any case, the Boston Principal Fellowship program,

combined with more active recruiting and the Exploring School Administration seminars, are successfully recruiting and preparing future school leaders for the Boston Public Schools.

Selection

Teachers

Technology has dramatically enhanced the selection process at BPS. All teachers apply online, and the first round of screening involves checking to see if they meet the requirements to be a teacher in Boston, which include licensure, a bachelor's degree, and grade and subject level certification. Those applicants that make it through that process take the TeacherInsight survey, a tool from Gallup that helps BPS assess whether that person has the capacity and mentality to be an educator. The only candidates that the district does a more extensive prescreening for are the ones in high-need areas: math, science, English-language learners, special education, and minority candidates.

The main quality that BPS is looking for is district fit. This paragraph explains the kinds of questions that the teacher candidates for high-need areas, those prescreened by the district, are asked when they are interviewed. (The same kinds of questions are a part of a packet of information that the district has put together for principals to help in the hiring process, as described below.) Although a part of district fit is an appreciation of diversity, it is deeper than that. Candidates must be prepared to provide culturally responsive teaching, and to assess their readiness to do so, they are asked how they relate to people who think differently, act differently, or look differently than they do. This helps the district assess prospective teachers' cultural proficiency. District officials also want to know if the candidates are experienced in an urban environment or aware of what it means to teach in such an environment. They are asked about classroom management strategies and whether they understand what diversifying their teaching

means. District leaders try to assess whether the candidate will be able to address the needs of BPS kids by talking to potential teachers about scaffolding the work for kids who need help and the kids who need more, and how they would pair those children with other children. They also inquire about the kind of community they hope to create with their fellow teachers, and attempt to gauge the candidates' openness to receive feedback and share, as well as ask what kind of supports they would need from a principal.

With the majority of teacher hires, principals are in charge of the process, with the district getting involved mainly to facilitate the process. Principals receive a list of qualified candidates from the HR department, but, as mentioned above, the actual hiring is done at the school site by a school selection committee. The committee consists of the principal, teacher representatives and at least one parent; the principal has veto power when it comes to hiring decisions. The parent used to have to be involved in the selection of new teachers, but because it is often hard to involve them over the summer and this was holding up some hires, this is no longer required (although still encouraged).

Another way that the district gets involved is to hold job fairs each year for potential new teachers. At these job fairs, principals can make pitches about their schools to potential candidates, but some principals are better at using this time to their advantage than others. District leaders recognize that this is an area where more professional development is needed. Further, through surveys of principals, the HR department learned that principals could use more information about who to hire and how to run their hiring processes. In response, the HR department has prepared a selection toolkit for principals, which walks them through the processes, gives them hiring criteria and information about hiring quality teachers, guides them on how to do reference checks, gives interview questions, and recommends how to train hiring

committees. This toolkit, which will be rolled out in the summer of 2008, will enable the district to encourage selection committees to use the tools they are putting in place to help ensure that Boston has a cadre of high-quality teachers. One example is the use of the scores from the TeacherInsight online screening tool, as was previously mentioned, although teacher candidates take the test, many principals do not use the scores when making their hiring decisions.

Still, other processes were put in place under McGann that help facilitate the decentralized hiring process. For example, HR provides the Academic Superintendents who are part of the Teaching and Learning departments, with data that can help them encourage principals to do their hiring earlier and do it better. These reports show the schools that each Academic Superintendent are responsible for, how many vacancies each of them have, and the posting dates for the positions. This allows the academic superintendents to stay on top of encouraging the principals to act as quickly as possible. It is an example of a means that the district has in bridging the gap a bit between a decentralized hiring process and district leaders' understanding of how critical it is that these hiring processes happen on time. These data were previously not available, but HR, knowing its importance, hired someone to perform such analyses.

Although the decentralized hiring process leaves a lot open to question, including, for example, whether principals are truly on board with district priorities such as hiring more minorities, the HR reinvention has meant a huge improvement in selecting high-quality teachers to work in the Boston Public Schools. Some measures of this include the increase in the number of highly qualified hires (defined as certified in Massachusetts, with a bachelor's degree and having majored or minored in the subject they are teaching by NCLB), which have climbed over

the past 3 years from 88% in 2005-06 to 90% in 2006-07 to 96% in 2007-08. The remaining non-highly qualified teachers are in the high-need areas discussed earlier.

Principals

The selection process for principals has changed under the new superintendent, Carol Johnson. Prospective principals are now screened centrally, and then school committees are given a list of three or four principals to choose from. The new screening process is modeled on the screening process for the Boston Principal Fellows Program, which is as follows: Step one is to apply online, and these applications are screened according to whether the applicant has a license, a master's degree (which is required to be a principal in Massachusetts), and 3 years of teaching experience. Those who make it through that initial set of criteria go on to step two: a paper screening where they are given an opportunity to describe in writing their leadership qualities, interpersonal skills, and attitudes and beliefs about teaching and learning. A select group of candidates with satisfactory essays from step two are then invited to move on to step three, which is a district screening day. This is an intensive day where candidates are asked to articulate their priorities in a number of interviews and demonstrate their ability to manage a school and its staff. Those that make it through the district screening day then fill out a preference sheet listing the schools where they would like to be hired. The district uses this information to make a list of three or four recommended candidates, which is then sent to school-site selection committees and the actual selection of the principal is handled by that committee, with final signoff by the Superintendent.

Placement

Teachers

All placement is in the hands of individual schools and school selection committees. Because the district does not currently have any teachers from organizations like TFA, which often require their recruits to be placed in cohorts, the placement process in Boston remains completely decentralized. The only exception to this is district leaders encouraging specific teachers to work in high-needs schools. However, as explained in the section on compensation, since the union does not allow the district to pay teachers more to work in certain schools unless they are working more hours, it is more difficult to get teachers into these schools than it might be with a pay incentive in place.

Principals

Although the placement of principals is also decentralized, the district retains some control by giving schools a list of three or four qualified candidates and allowing the school committee to hire their choice from that list. In addition, the superintendent has the right to place a particular principal in a school if it is low-performing.

Summary

Boston has implemented a number of human capital innovations that, for the most part, work together to help the district function more effectively. Some examples of changes that have helped meet the priorities for increasing teacher quality and hiring more minority candidates include the compressed hiring schedule, the ability to offer promising candidates a contract early, and the grow-your-own teacher training program emphasizing training minorities to work in the district. Further, the need for high-quality school leaders trained to work in Boston led the district to create its own principal fellowship program, for which it set high standards for who

would be invited to participate in the yearlong, paid preparation for this role. The principal candidates who came through this program were of such high quality that the new superintendent decided to use the program's selection process to identify principal candidates to send out to the school committees, rather than leaving the entire hiring process to schools as it had done in the past. This change allows the district more control over the quality of the principal candidates, and it came about as a result of an innovative program it designed for training its own principals, the Principal Fellowship Program.

The negotiated changes to the teacher contract have also had a dramatic effect on BPS's ability to recruit, select and place high-quality teachers. As a result of the changes to the transfer process described in the last section, including the end of blind bids and the widespread use of open posting, the percent of total vacancies that are open posted went from 66% in 2006 to 84% in 2007. In 2008, because of budget cuts, the district restricted open postings in some program areas and the percentage dropped to 67%. In addition, the number of teachers who are highly qualified has increased from 90% in 2006 to slightly above 96%.

3. TRANSACTIONAL IMPROVEMENTS TO HR PROCESSES

When Tom Payzant became superintendent of the Boston Public Schools in 1995, he described HR in Boston as a mess. The Human Resources Department used a paper and pencil system, the bulk of new teachers were hired in August right before school started, most did not get paid correctly or on time, there was no induction or mentoring program to support new teachers, and principals had to talk to 10 different people in the HR department to get answers to their human capital related questions and were frustrated and fed up with the dysfunctional nature of the department.

According to Broad's theory of educational improvement, districts are unable to make progress on strategic priorities when systems for basic transactions are not reliable. Using Boston's HR department when Payzant arrived as an example, administrators could not think strategically about new teacher support and induction when new teachers were not reliably getting paid. Because of issues like this one, a number of changes were made to improve HR transactions. These changes fell into one of three categories:

- strategic,
- technological, and
- organizational.

Organizationally, Payzant was well aware that new leadership was needed to turn around the HR department. Luckily, a 1993 Massachusetts statute gave urban superintendents control over their personnel. This gave Payzant the latitude to do an extensive reorganization which was needed to implement his instructional improvement strategy in the district. In Payzant's experience as a superintendent, this was the first time he had been given this level of control and it was critical to his success in turning around the HR department in Boston. His first new hire for HR director was a minority female from the private sector who he believed had many of the qualifications needed to reform the department. But two things limited her effectiveness: one was her dislike of all the media attention that the position carried and the other was her lack of understanding of the distinction between collective bargaining in the public sector and in the private sector. After 18 months, Payzant let her go, replacing her with Ray Shurtliff, a man who had come up through the Cambridge system and was well respected in the region. He was able to make a number of improvements including technology upgrades and a shift to a more customer-

service orientation. After 5 years, Shurtliff retired, giving Payzant an opportunity to hire another candidate.

This time he worked with the Broad Academy to identify candidates and chose Barbara McGann, a former Navy admiral. McGann made sweeping changes, including tearing down all the cubicle walls in the HR department office and hiring many new leaders into the department. As she was hired, Payzant made another significant change: he made the HR director a member of his cabinet, signifying his understanding that an effective human resources department was key to achieving the district's instructional improvement goals. This strategic move allowed an ongoing dialogue between HR leaders and other district leaders that has been key to the success of the HR reinvention.

As mentioned previously, in 2004, McGann and her deputy, Michelle Boyers (also a Broad Resident, who served as head of HR from 2006-2008), launched Phase I of the BPS HR Reinvention initiative. Many of the priorities were discussed in the section on talent acquisition, including earlier teacher hiring, increased teacher quality and diversity and critical needs hiring, but the changes to transactional improvements discussed in this section focused on fulfilling one additional HR priority: improving the customer service provided by the HR department. This required a cultural shift, because the old HR department in Boston was an insular place. People had their area of expertise and principals who were trying to hire someone were expected to go to a different person for every different kind of position for which they wanted to hire, and even so, getting something done with the HR department often required a special trip to the district office or a personal relationship with someone on the HR staff.

As such, one of their first steps was to create a new teacher support team, for teachers new to the district, consisting of three people from the HR department dedicated to taking care of

new teachers from the moment a principal identified a teacher as someone they wanted to hire through that teacher's first year. Until this team was in place, little customer service was available for these new teachers or the principals who hired them. As a result of the hiring process not running smoothly, it was common for new teachers not to get paid when the first paychecks of the school year were processed because they had not been officially added to the system.

Phase II of the HR reinvention acknowledged that you can do a lot by hiring the right people, but updated technology is also critical for transactional improvements. The desire to have the process of getting hired at BPS be efficient and effective led HR leaders to develop an applicant tracking system, and to do so required bringing technology up to date. One of the complicating issues of doing so is the fact that the Boston Public Schools function as part of the City of Boston, and as such they are required to use the same platform that the city's HR department uses, which is Peoplesoft. And although Peoplesoft works well for keeping track of the city's human resources, in its off-the-shelf form, it does not function well for school districts because of its unique personnel issues. For example, when someone is retiring in 6 months, they need to continue to be paid while they are still working, but the system also needs to identify that the position is coming open so that the process can begin for filling the vacancy, something that was not easy to do with Peoplesoft.

In December of 2007, the head of staffing (also a Broad Resident) debuted a future-year staffing and budgeting tool called FutureForce that removes the need for employees to keep information for the future in separate spreadsheets outside of the main system. The old way of doing this was to have two separate systems, one for the current year and one for the future year, but HR leaders hired outside consultants who used Kenexa to create a system that automatically

bridges the two databases, saving a huge amount of time and money. This system, which went live in early February, houses the budget and staffing for the next school year in the system that is updating current information but not changing future information. Once the future year becomes the current year, all of the information can be integrated literally at the touch of a button.

These systems help facilitate Boston's online hiring process, and HR staff perform roles to support this process that range from completing an approval process for any job that gets posted to being a point of contact for principals who need help with any stage of the process. In addition, The HR department's dedicated new teacher support team "onboards" all new teachers with welcome celebrations, a 4 day institute, monthly seminars, and support through new teacher developers. And these are just two examples of the department's shift to a customer-focused orientation.

Summary

The recognition that to be an active partner in Boston's ambitious goals for instructional improvement meant a completely redefined HR system was a huge positive change for Boston Public Schools. From Payzant's stewardship of the process to his perseverance in finding the right people for the job to the highly trained Broad Residents he eventually brought on board, these changes were monumental and brought about a complete cultural shift in Boston's HR department. Statistics show that principals are pleased with reinvented department: the percentage of principals who are happy with their interactions with the HR department went from a low of 17% in 2004 to a high of 75% in 2007. The satisfaction rating of HR services for new teachers hired by the district has also risen dramatically to a high of 82% in 2007-08.

4. TALENT DEVELOPMENT, PERFORMANCE MANAGEMENT AND COMPENSATION

In order to meet the priorities outlined in Phases I and II of the HR Reinvention, multiple changes have been made in the category of talent management. District leaders knew that recruitment, selection and placement were only the beginning steps for effective talent management. Specifically, to increase teacher quality and support new teachers, the induction and mentoring programs were completely revamped, and professional development was restructured around the eight dimensions of effective teaching. The district has also developed a continuum for these dimensions that is used to guide mentoring and professional development support; see Appendix A for an example of how these dimensions have been further explicated in a continuum. This section is divided into four subsections: Induction/Mentoring, Professional Development, Performance Management and Compensation. As in previous sections, where these differ for teachers and principals, the subsections are further divided into subsections for these positions.

Induction/Mentoring

The previous section on transactional improvements to HR processes mentioned the new teacher support team of three employees in the HR department. This team is complemented by a new teacher support team within Teaching and Learning, and these teams work together to comprehensively support new teachers. The theory of mentoring to which district leaders subscribe suggests that unless teachers are supported in their schools buildings to enhance their classroom management and instructional strategies, they will not succeed. The sections below describe the induction and mentoring provided to teachers and principals.

Teachers

In the state of Massachusetts, in order to get to the next stage of licensure, teachers must receive mentoring. Because of this statute, the district has provided some mentoring for a number of years, largely as part of a summer institute, but sometimes budget shortfalls interfered, and it was generally not the conscious component of a strategy to retain and develop teaching talent that it is today. The union has been engaged in a lawsuit over the past 5 years against the district to get them to implement this state law.

In the 2005-2006 school year, BPS decided to make induction and mentoring stronger and more strategic. Now in its second full year of implementation, the induction and mentoring process in Boston is multifaceted, designed to provide maximum support for first-year teachers and increase the chance that they will both be successful in the classroom and decide to stay in the district. The change in thinking about induction and mentoring was based on studies of the needs of new teachers and strategies for increasing retention. These studies also identified the financial cost to the district of high teacher turnover, and the district is attempting to combat this turnover by providing more support.

In terms of induction, the district holds a 3 day institute for new teachers every August, where all new recruits are given “red carpet” treatment. The mayor and superintendent together welcome all new teachers (including teachers who are new to the classroom and new to the district), and charge them with their very important task: teaching *all* the children who come through the doors of the Boston Public Schools according to the high standards of the district. The goal of this institute is to make these teachers feel welcome and valued, as well as to give them information they will need in the district, such as classroom management and differentiated instruction.

Each month, the district holds a seminar for new teachers. These seminars are not required, but for those who choose to attend, they offer information on an aspect of the eight dimensions of effective teaching. Because teachers come to the district with such a varied level of expertise, district leaders do not want to require these training sessions, but they do intend to develop a competency-based system whereby new teachers could demonstrate competencies or come to the seminars if they demonstrated some areas in need of improvement. This could be something akin to the statewide competency system in Connecticut, the Beginning Educator Support and Training Program (BEST).

The district provides advancing practice seminars for second-year teachers or teachers that are new to the district but have prior experience teaching. Topics covered during these seminars include teaching English-language learners, differentiated instruction, and assessments specific to BPS.

In terms of mentoring, the district began by piloting a program in the 2005-06 school year based on the UC-Santa Cruz model, where two teachers were released from their teaching responsibilities and assigned to mentor 14 teachers each. This pilot program was analyzed by Mathematica and ETS as part of a study of interventions which impacted student achievement and teacher retention. The pilot was successful, and in the summer of 2006, there was a side agreement to the negotiations of the teacher contract identifying a new role: teacher developers. This negotiation was not finalized until after the school year began because teacher developers were both released from their teaching responsibilities and paid an additional 5%.

Mentors. All first-time BPS teachers have mentors, but whether they are new to the classroom or experienced teachers new to BPS determines what type of mentoring they receive. Teachers who are brand new to the classroom work with one of the 16 full-time teacher

developers who support a total of 200 new teachers. The support they provide includes assistance around the eight dimensions of effective teaching – the pair use the continuum (see Appendix A) and set goals. The mentor also organizes an opportunity for the new teacher to observe an exemplary teacher.

Teacher developers. There are also part-time teacher developers who are full-time teachers who receive a stipend of an additional 5% for each new teacher they support. About 75 teachers are part-time developers; together they support about 125 first-year teachers. These part-time developers are selected by principals and work with new teachers in their building. District leaders noted that having this role in school building is mutually advantageous – the new teacher gets the support they need and the veteran teacher gets a little extra money and a new role, often enough to keep them teaching longer and with higher rates of job satisfaction. The union had substantial involvement in the development of the mentoring program including helping form the role of new teacher developer.

Networkers for low-performing schools. In the five lowest-performing schools, the district provides another layer of support through “networkers,” whose job it is to support the teachers in the toughest schools by connecting newer teachers with veteran teachers. These networkers are teachers at these low-performing schools who have been identified by the principal as having the necessary leadership skills, and they are compensated with an additional 5% above their regular salary to provide this service. The support provided by the networker is intended to supplement mentoring rather than replace it.

Other mentoring support. For second- and third-year teachers, one option for additional support is an online course called TEAMS teaching circles, an online mentoring activity where some retired teachers and some current teachers provide support to those who self-select into this

program. In the 2007-2008 school year, this program served approximately 60 teachers. The district is also considering holding seminars for third-year teachers focused on leadership skills. These seminars would also include information on the change process and adult learning, and could be a part of a career lattice system that would train teachers with leadership potential to play a larger role in their buildings or in the district while increasing their job satisfaction at the same time.

Other, less formal mentoring relationships also exist, such as “buddy” mentors, which are set up at the school site. These relationships are particularly important for teachers who are not working with a new teacher developer, and the district is hoping to encourage principals to set up these relationships by incorporating this concept into training for principals.

All of these supports for teachers are based on the district’s vision of good instruction as detailed in the eight dimensions of effective instruction. Using this model of instruction to guide the content of support helps ensure that the teachers are given a consistent message and sufficient scaffolding for developing into teachers who embody these eight essentials of effective instruction.

Principals

New principals to BPS receive both induction and new principal support in the form of induction and mentoring. Induction for new principals involves a 4 day institute held either the last week in June or the first week in July. At this institute, district leaders try to strike a balance between providing new administrators with the information they will need to do their job and time to reflect about the adaptive changes they will want to make in their buildings. As such, the activities range from a nuts-and-bolts session with HR to learn all about the services they provide to principals and how to access them along with time to develop entry plans. To do the latter,

new principals are asked what their first 100 days will look like and get help thinking about their initial time leading the school.

Every first-year principal is also assigned a mentor, and one of the events during the 4 day institute is a lunch between the mentor and the mentee to begin developing this relationship. The novice and seasoned principal then come together three times during the year to work together, although the district has received feedback that more of a structured method of having these meetings would be preferable. The district is considering making changes based on this feedback, as well as thinking about how to possibly extend the mentoring relationship into the second year.

BPS officials hold monthly “just-in-time” sessions to provide training for new principals on issues that are on the horizon for them. For example, in November the topic is usually budgeting because the budget is due in December; in January, the topic is usually “probable org” which is the term for funding and staffing for the following year. The district also holds monthly networking meetings that are drop-in-as-you-can but they are currently thinking about how to provide more structured time to think about how to improve practice.

Performance Management

The performance management system in Boston, which includes teacher evaluation, assigns teachers one of two ratings: satisfactory and unsatisfactory. District leaders are working to incorporate the dimensions of effective teaching in the district’s vision of effective instruction into the performance evaluations so that there is a strategic link between these pieces of talent management. The district recently started a peer assistance program for teachers who are struggling whereby four full-time teachers are available to work with teachers who receive

unsatisfactory reviews; district leaders had hoped for a peer assistance and review program but the union rejected the review piece of the program.

As in many districts with strong unions, it is difficult to “evaluate out” unsatisfactory teachers. Some changes have made it a little easier, including the end of voluntary excess, whereby a teacher anticipating an unsatisfactory rating could voluntarily place themselves into the excess pool whereby they would be transferred to another school in the district rather than evaluated out. Teachers no longer have that option. In addition, the HR department hired two former school administrators who are experienced with evaluating teachers to provide support, including conducting some of the evaluations, to principals in this situation. Because it is such a complex process, where evaluations have to be done at specific times and specific intervals, having these “experts” help principals through the process has made a big difference in the success rate of terminating unsatisfactory teachers. Another change that has helped improve this success rate was negotiated in the latest rounds of the teacher contract; the change made it so that teachers who had received one unsatisfactory evaluation could not go out sick and remain out until the deadline passed during which time the next evaluation was required to be conducted. Underperforming teachers used to use this process to beat the system, but the current contract stipulates that when a teacher goes out sick, the clock stops in terms of when the next evaluation must be done. As a result of all of these changes, the percent of teachers receiving unsatisfactory evaluations who are removed from the district grew to 34% in 2006 and improved again, to 44%, in 2008.

In terms of tracking the effectiveness of individual teachers, district leaders are eager to move forward with such analyses. They are working with a Harvard researcher who now has the teacher and student data needed to perform value-added analyses. BTR is particularly interested

in the information such a study can provide, and they will be more likely to have the freedom to use such information. The district has already met with union leaders to discuss what this information will mean to the district, but no formal arrangements have been agreed upon as to how the data will be used.

Professional Development

Teachers

Professional development is one of the district's seven essentials for whole school improvement, and as such, it is regarded as vital to the success of the district. Through a partnership with The Boston Plan for Excellence, much of the professional learning that has taken place in Boston over the last decade has been through the Collaborative Coaching and Learning (CCL) model. Beginning in 1997-98, literacy coaches were added to a group of BPS schools called 21st Century Schools. In 2000-01, math coaches were added. Today, coaches are used in all 31 Commonwealth Priority schools and other schools as needed.

Over the course of Payzant's tenure at BPS, professional development became increasingly decentralized, with content and delivery of professional development controlled at the school site. However, as the district has begun thinking more strategically about human capital management, they have begun working on a process for tracking the extent to which the professional development that teachers receive matches the eight dimensions of effective teaching. At this point, school leaders know that these principles should guide their use of professional development time with teachers, but there is no formal process for ensuring that is the case.

The BTU teacher contract specifies the following time shall be devoted to professional development: 3 days added to the teacher contract for in-service, curriculum development, or

other programmed professional purposes; 1 day before school starts in September; and 18 hours of professional development activities beyond the regular school day hours. School leaders use this time to address the learning needs of their faculty; for example, a school with new teachers may devote a portion of their 18 hours to hold weekly sessions for new teachers.

Principals

Principals' needs determine the professional development they receive. Principals who struggle with some problem of practice have access to consultants who can help them. These consultants include partners in local universities, course leaders from the fellowship program, and current and former principals.

For the principals of the 60 lowest performing schools, the district hired The New Teacher Project to provide a training session in the summer of 2007 that focused on recruitment, selection and cultivation of new teachers. Although district leaders recognize that many more principals could use this type of training and were pleased with the training provided, the district did not have the money to continue that program in 2008. However, district leaders have incorporated aspects of the training into a Hiring Guide to be provided to all school leaders.

Compensation

Boston uses the single salary schedule to pay teachers. As noted in the first section of this case study, Boston intentionally sets its starting salaries higher than the surrounding districts to remain competitive, which helps the district recruit high-quality teachers. An additional tool that district leaders have that allows them to recruit experienced, high-quality teachers who are minorities or who are trained in high-need areas of math, science, English-language learning or special education is the ability to match the current salary of such candidates willing to transfer to BPS.

Boston does not have performance pay, but it does differentiate pay based on specific roles that some teachers play. For example, full-time new teacher developers receive 5% over base pay and are released from classroom duties. Part-time new teacher developers are paid an additional 5% over base pay for every teacher they mentor (up to two). Also, teachers who work in schools with an extended day to meet the needs of their high-poverty student population earn an additional 15% for the extra hour per day they spend with kids. This was the only way that district leaders have been able to pay teachers more for working in low-performing schools. They tried to negotiate with the union to agree on a way to compensate teachers more for working in low-performing schools (sometimes called combat pay), but the union was unable to support a pay increase that was not tied to additional duties or contracted time. The district also offers an incentive to teachers to get National Board Certification, and pays all teachers who receive certification and extra 4% above their regular salary for every year that they keep their Board certified status.

Summary

District leaders in Boston are acutely aware that the success of their school system rests on the quality of its teachers and principals. As such, they have created a comprehensive system of induction and mentoring for new teachers and a structure to support school leaders. In addition, they are working toward a system of professional development and performance management that is strategically aligned with the seven essentials for whole school improvement and the eight dimensions of effective teaching. Although the district has not moved very far in the direction of using compensation to support its efforts to recruit and retain high-quality teachers and school leaders, all of the systems described in this section that have been or are

being developed enhance the district's efforts to ensure that its teachers and school leaders are the caliber that Boston's public schoolchildren deserve.

5. CONCLUSION

The HR reinvention in Boston is a critical element in its ongoing success with instructional improvement. The signs of this success are many, including the recent (2006) receipt of the Broad Prize in Urban Education and rating as one of the school systems with a strong improvement trajectory in a 2007 McKinsey and Co. report entitled "How the World's Best-Performing School Systems Come Out on Top." Some highlights of what has been accomplished include:

- a compressed hiring timeline,
- a team dedicated to the support of new teachers,
- a computer system that allows seamless storage of information for current and future school years, and
- grow-your-own teacher- and principal-training programs that produce highly qualified individuals specifically trained for their role in the Boston Public Schools.

Several factors have contributed to the district's ability to make so much progress, including:

- continuity of leadership,
- talent capacity,
- the nature of the labor-management relationship,
- fiscal capacity including the infusion of private funds, and
- personal relationships.

These factors are discussed in the paragraphs below.

Continuity of Leadership

It is extremely rare for an urban superintendent to remain in a district as long as Tom Payzant. The average tenure of an urban superintendent today is less than 3 years – Payzant led BPS for almost 11 years. During his tenure, the mayor, a strong supporter of Payzant, remained the same, as did many members of the school committee. The continuity in the district’s leadership has meant that district and school leaders have basically been working under a version of the same essential principles for school improvement for more than a decade, allowing for a much greater degree of consistency in their efforts to improve instruction. There is no doubt that the key human capital management initiatives and practices in the Boston Public Schools that are described in this case study were greatly aided by the long tenure of Thomas Payzant and his understanding of HR’s critical role in improving instruction.

Additional continuity of leadership during Payzant’s tenure was provided by Mayor Menino, who gave unwavering support to Payzant and consistent leadership for the mayoral-appointed school committee. This level of continuity and the nature of the school committee, as opposed to an elected board, meant that Payzant was free to lead the district according to the vision he brought to the district and developed further during his tenure.

Human Capital/Talent Capacity

As described in Section 3, when Payzant began his reorganization of the HR department he had a difficult time finding candidates who could help him accomplish his broad goals of tying human resource management to instructional improvement. Although some progress was made with his first few hires, it was when he began to work with the Broad Foundation that he found people with the talent and capacity to lead the district according to his vision. Barbara McGann and Michelle Boyers, having been selected and trained by the Broad program, were

able to vault the human resource department reinvention to a whole new level. This leadership also helped remove some of the biggest hindrances to instructional improvement in Boston, which had been not having the teachers and principals needed to carry out the instructional improvement strategy at the school level. Some of these hindrances were problems with the teacher contract, some of them were transactional obstacles in the HR system, and some of them were pipeline issues – solutions to all of these issues required district leaders to understand the strategic goal of HR. The creation of the Boston Teacher Residency (BTR) and the two pronged system for recruiting principals – the Exploring School Administration in Boston (ESA) program and the Principal Fellowship Program, have both helped address pipeline issues by helping ensure that high caliber individuals, many of them minorities to mirror the population of the students, are well-prepared to teach and lead in the Boston Public School system.

Nature of Labor/Management Relationship

Boston has a strong teacher’s union, and while at times the relationship between the district and the union became adversarial, in general, Payzant managed to have a productive working relationship with its leadership, making difficult negotiations around senior teachers and differentiated pay for different roles possible. District leaders continue to work hard to maintain a positive and respectful working relationship with BTU, knowing that its teachers are key to its success. Union officials are optimistic about relations under Superintendent Johnson, who they view as collegial.

Funding, Including Outside Funding

There is no question that when the fiscal climate is good, more resources are available to make the changes needed. During Payzant’s tenure, the economy was in better shape and money was available to do what needed to be done: hiring consultants, committing some fiscal support

to the grow-your-own strategies of Boston Teacher Residency (BTR) and Principal Fellowship Program, and other needs.

Private funds have been absolutely instrumental in BPS's success. From all of the many supports provided by the Boston Plan for Excellence (including the Boston Teacher Residency), to the significant investments of the Annenberg Foundation, to the award from Broad... much of what has been accomplished in Boston could not have been accomplished without private funds.

Relationships

Another factor identified by former superintendent Tom Payzant as contributing to the success of the human capital reforms in Boston is the importance of personal relationships. Payzant's friendship with Ellen Guiney, Director of the Boston Plan for Excellence (BPE) when Payzant began his tenure at BPS, meant that the two were able to work together to accomplish things that the district could not have done without the support of BPE. Also, from his experiences in San Diego, Payzant knew that the way to work with the union was to have personal relationships with the leadership, and this too allowed him to accomplish a lot more than he could have with an adversarial relationship. Further, the collaborative relationship between Mayor Menino and Superintendent Payzant meant that two powerful people were working together to improve Boston's public school system.

The Future of Strategic Management of Human Capital in Boston

Moving forward in Boston, the HR director spoke of the Broad model for district improvement, which is based on the idea that transactional improvements are needed as a basis for moving forward and the better the transactional processes function the more likely it is to make strategic progress. With so much accomplished in terms of transactional processes, the next step is to embed these processes and think strategically about how all of the critical parts of

a district's human capital management system – the central office, school leaders, teachers – can work together to maximize effectiveness at all levels. Some of these next steps were described in this case study, including providing a selection toolkit for school selection committees, making sure principals know how to hire high-quality teachers that will work well in their schools, and expanding the training for principals provided by The New Teacher Project in the summer of 2007. With the seven essentials for whole school improvement and the eight dimensions of effective teaching firmly established, the district has begun to think strategically about how all of the different elements of human capital management – recruitment, selection, placement, professional development, performance management, compensation – can be designed around these principles.

To formalize this process, the district has convened a group to discuss Phase III of the HR reinvention, which will be focused on how the district thinks about human capital management. Questions posed at the first meeting included: What's the district's theory of change about how human capital can drive improvement, where human capital means all levels of human capital with teachers at the core? What needs to happen district-wide to support these processes?

The group is composed of the superintendent; the new chief academic officer; Human Resources; key folks from teaching and learning including the head of teaching and learning, the director of new teacher support, the assistant superintendent for teaching and learning in the institute of professional development; and key folks from the Boston Plan for Excellence (BPE), including the director of BPE and the director of the Boston Teacher Residency (BTR).

Bridgespan is working with the district to facilitate the conversations at these meetings, and

some folks from Harvard with an interest in this area are also helping the group think about the strategic management of human capital in the Boston Public Schools.

Although it is too early to say what will come of this working group, one thing is for sure: when it comes to human capital management in large urban school districts in the United States, Boston is one of a handful of districts that is ahead of the curve. The priority placed on HR Reinvention under Payzant brought substantial improvement, and with new momentum from recently appointed superintendent Carol Johnson, Boston is poised to become a leader in thinking and acting strategically on human capital management issues.

Appendix A – Example of continuum for the dimensions of effective teaching

Dimension One: Demonstrate Excellence, Equity, and High Expectations for All Students

Demonstrate a commitment to excellence, equity, and high expectations for all students with an emphasis on building on the strengths that students bring to the teaching/learning process and closing the achievement gap between subgroups within the school.

EXPECTATIONS FOR TEACHERS	BEGINNING	EMERGING	APPLYING	INTEGRATING	INNOVATING
Sets high standards and shows through words, actions, and instruction that they believe all students can meet them.	Acknowledges students' efforts and approaches learning activities with positive beliefs Posts learning objectives	Uses some strategies and activities to develop students' self-esteem. Uses posted learning objectives to guide instruction.	Uses a variety of strategies and language stems to enhance students' feelings of self-worth and communicates a belief that all students can learn Uses outcome-based learning objectives	Provides students with a variety of strategies that they can use independently when faced with academic difficulties	Facilitates discussions in which students demonstrate their thinking. Asks probing questions to deepen students' learning.
Explains and posts each day's learning objectives and how class time will be used. Ensures each student has access to challenging, grade-level appropriate content and uses a variety of strategies to ensure they meet the standards.	Follows lessons as planned. Monitors whole group progress during specific lessons.	Uses strategies to pace and adjust instruction to ensure more continuous engagement. Offers guided and independent practice.	Solicits comments, questions, examples, connections, and other contributions from students throughout lessons. Implements instructional opportunities in which students are interacting with ideas, materials, teachers, and one another to meet the standards.	Encourages students to select from a range of materials and instructional practices to meet the standards.	Analyzes, adapts, and creates a wide range of resources which support student development. Provides opportunities for student and community collaboration to meet goals and standards.
Identifies each student's learning needs and explicitly teaches student to identify their own strengths and learning needs.	Identifies students' strengths and areas in which they need support.	Communicates strengths to individual students through informal and formal discussions.	Provides opportunities for students to highlight individual strengths and build on these areas to learn new skills and content.	Structures learning activities that enable students to monitor their own progress and strengths. Actively engages students in self-reflection and goal setting around their individual strengths and learning.	Encourages students to share methods of monitoring their own progress and strengths with peers, teachers, and families.

EXPECTATIONS FOR TEACHERS	BEGINNING	EMERGING	APPLYING	INTEGRATING	INNOVATING
<p>Introduces new material by building on what students already know and helps them use it to learn new skills and content.</p> <p>Explores themes that are relevant to students' lives and experiences.</p>	<p>Presents lessons in a clear, logical order.</p> <p>Lessons build upon one another.</p>	<p>Uses more than one appropriate teaching strategy to present subject matter and facilitate student understanding.</p>	<p>Facilitates activities that are appropriate for student development and encourage student understanding and critical thinking skills. Strategies connect themes and concepts to students' interests and backgrounds.</p>	<p>Develops and uses multiple strategies that make connections across disciplines and between concepts, that challenge all students. Encourages students to think critically.</p>	<p>Uses a variety of appropriate instructional strategies that challenge and support all students to independently apply and think critically about the subject matter and apply it to real-life situations.</p>