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January 19, 2000

New Thinking on What Makes a Leader

By Lynn Olson

As policymakers turn their attention to finding effective leaders for the nation's schools, they face as many questions as answers: What is the nature of leadership? How should principals and superintendents be trained? And are the jobs—as they are now structured—too much for any one person?

LEADERSHIP

A Special Report

"There's a sort of unarticulated, growing understanding that we've conceived the job of school leader wrong for contemporary needs and conditions, and that it needs to be changed," said Thomas Sobol, an education professor at Teachers College, Columbia University, and a former New York state schools chief.

In recent months, a broad consensus has emerged across education, governmental, and philanthropic groups on an urgent need to address what many see as a scarcity of strong leadership in public education, at both the school and district levels. ("[Policy Focus Converges on Leadership](#)," Jan. 12, 2000.)

A dominant belief in policy circles, driven in large part by the academic-standards movement, is that principals, instead of being building managers, should become leaders of instruction—dynamic, inspirational educators focused almost exclusively on raising student achievement.

The changes over the past decade in what's expected of principals have been dramatic, said Vincent L. Ferrandino, the executive director of the National Association of Elementary School Principals. "It's gone from a position that was largely managing a student program, managing teachers, and managing the facility to one where the chief responsibility now is instructional leadership." Yet there is widespread agreement that many principals lack both the time and the training to fill that role.

"They aren't evaluated on that, they aren't expected to do it, they aren't trained to do it in education programs," said Joseph Murphy, a professor of educational leadership and organization at Vanderbilt University. "It's not the principal's fault. The problem is, one day you wake up, and the rules of the game have changed."

Instructional Leaders?

Similar conflicts have roiled the world of district superintendents,

who often must divide their time between issues of curriculum and instruction and such noneducation matters as labor management, budgeting, and local and state politics.

As a result, observers argue, administrators are ill-equipped for the new environment in which they, along with their students and teachers, are judged according to test scores and performance goals to a greater degree than ever before.

"Some very large proportion of principals aren't qualified to do the work, even if they had the time to do it," said Richard F. Elmore, a professor of education at Harvard University.

At the same time, it is by no means clear precisely what is meant by "instructional leadership."

"What I tell my principals is, I want them spending a minimum of two hours of the school day on supervision, while students are there," said Charles C. Lyle, the superintendent of the 1,900- student Columbia, Miss., school district.

But Barry W. Furze, the superintendent of the 3,000-student Meade district in Sturgis, S.D., said while principals "certainly have to know something about instruction, in the final analysis, I think it's partly a matter of motivation, of providing the resources, maybe of finding the people to help if you don't have the expertise in your school district to deal with a problem.

"It's being the coordinator of the whole process," he said, "but with the emphasis more on the instructional aspects, not the managerial aspects."

John I. Goodlad, a professor of education at the University of Washington, describes the principal as the "chief worrier": someone who can create a culture of teaching and learning and weave together the disparate pieces of the school environment.

"Good leadership is not delegating the principal to be the instructional leader in the sense we were talking about back in the 1980s. That's sheer nonsense," Mr. Goodlad said. "First of all, principals aren't necessarily picked because they were good teachers. Second, if they are being chosen to teach the teachers to teach, we must have pretty lousy teachers. It's a weak model."

"I don't think that principals ought to be 'super teachers,' in the sense that they know everything good teachers in all the disciplines know," agreed Marc S. Tucker, the president of the Washington-based National Center on Education and the Economy. "What the principal really has to understand," he added, "is what it takes to improve achievement in the school in the core disciplines."

Or Business Managers?

At the same time, other forces are pushing principals and district chiefs in almost the opposite direction, with calls for greater management sophistication at the district level and more control in schools of budgeting and staffing decisions.

And superintendents and principals point out that their jobs can still rise and fall on whether they keep the buses running and the lunches delivered on time.

"We need to treat principals as managers and leaders," argued Louis V. Gerstner Jr., the chairman and chief executive officer of the International Business Machines Corp., in a speech at last October's National Education Summit. "If they deliver, they ought to control budgets, personnel decisions, modifications in curriculum, and school schedules."

Susan Traiman, the director of education initiatives at the Business Roundtable, based in Washington, said corporate leaders, in particular, were anxious to share their knowledge about management and leadership issues with the schools.

But, she observed, "if you look at very successful corporate leaders, there isn't one leadership model. There isn't one particular route that CEOs have taken. Some have come up through the company. Others have come from outside, from a completely different industry."

Educators or Noneducators?

Indeed, one of the biggest debates centers on where the next generation of education leaders should come from.

Many experts—though not all—contend that given the current emphasis on instruction, school principals must be former teachers.

"I think it's essential for the school principal to have experience as a teacher, to understand the dynamics of the classroom and have experienced that firsthand," said Mr. Ferrandino of the elementary principals' association. "I think anyone taking on that role without that kind of experiential background is really apt to make some poor decisions downstream."

But there is less agreement that superintendents must be drawn from the ranks of educators, particularly for big-city systems where the schools chiefs may manage tens of thousands of employees and annual budgets that rival those of many corporations.

"Look at Chicago and Detroit and San Diego and Seattle and Baltimore," said C. Kent McGuire, the assistant secretary for educational research and improvement in the U.S. Department of Education. Those districts, he noted, "have been more than willing to look outside of education for people to come in and run billion-dollar institutions, and they aren't under any illusion that someone who has grown up through the schools necessarily has all the experiences or background or preparation to grapple with those kinds of things."

In recent years, those districts and several other large systems have hired noneducators, including former military officers and business executives, for the top administrative job.

Many policy experts are particularly interested in San Diego, where

Superintendent Alan D. Bersin, a Yale-trained lawyer and former federal prosecutor, has teamed up with Anthony J. Alvarado, a highly respected educator with decades of leadership experience in the New York City schools. As San Diego's chancellor of instruction, Mr. Alvarado calls the educational shots, while Mr. Bersin runs the system.

"I can certainly imagine in places like Chicago and Boston that the model of a CEO who doesn't come out of education might work," said Mr. Murphy of Vanderbilt University. "There's no reason not to experiment—especially if you can get strong academic officers in there."

Mr. Murphy and others caution, however, that there are dangers in recruiting noneducators. "I don't think you can lead the Marine Corps one day and become a superintendent the next," said Robert S. Peterkin, the director of the Urban Superintendents program at Harvard University, which seeks to train leaders for the particular challenges of large districts.

As long as many female and minority educators remain underrepresented in the top jobs, he suggests, there are better places to look for talent.

"I don't feel the rush to go out and look for nontraditional candidates, because I think women and minorities are nontraditional candidates," added Mr. Peterkin, a former Milwaukee superintendent. "On the other hand, I don't think you have to go up the stairs one by one, being a teacher, then an assistant principal, and then a principal. That's absolutely deadening."

Rethinking Preparation

Of the nation's approximately 79,600 principals in 1993-94, for example, only about 10 percent were black, 4 percent Hispanic, and less than 1 percent Asian-American or American Indian. And more than 65 percent were male, despite an overwhelmingly female teaching force.

Many policy leaders believe that at least some of the causes of the leadership problem stem from the preparation programs that train school administrators.

"We were quite struck by the fact that the field of educational administration was not very well-informed, necessarily, by other fields of practice and other visions of leadership that might be interesting—whether it was management and business, or insights from the military, or other ways of thinking," said Michael Levine, a senior program officer at the Carnegie Corporation of New York. The foundation has awarded several grants recently to promote the study and improvement of school leadership, including one to *Education Week*.

"Quite frankly, I think we've been disappointed with the traditional teacher- and leadership-training programs," said Mr. Ferrandino of the NAESP. "They have not been able to move from the theoretical to the practical issues that principals face in a manner that's been, in

our minds, as effective as they need to be."

While he hopes to see significant changes in such programs, which prepare the bulk of school leaders, Mr. Ferrandino added that he believes a pattern of alternative-preparation programs is emerging. His own group is working with the National Association of Secondary School Principals and the American Association of School Administrators on ways to provide courses to administrators through the Internet.

"If university programs don't dramatically change over the next several years, I think we're going to look at all types of alternatives to prepare principals," agreed Gerald N. Tirozzi, the executive director of the NASSP. "I think the private sector is going to get very much into the game."

Others believe school districts should play a more direct role in preparing future leaders. A 1998 survey of 403 districts found that only about one-fourth had a program aimed at recruiting and preparing candidates from among current staff members.

"If you were a smart school district, you wouldn't just stand back and say, 'Gee, we need a whole lot of qualified people to do this work,' and run an ad in the newspaper," said Mr. Elmore of Harvard.

He cited as an example Community District 2 in New York City, one of the vast system's smaller subdistricts, which runs a yearlong program for aspiring school leaders in collaboration with Baruch College.

Last September, Teachers College launched a program with nearby Westchester and Putnam counties to recruit and train outstanding teachers to become principals. The curriculum is organized around case studies and includes a lengthy administrative internship.

"I would hope colleges and universities would become very good at training, but they aren't now," said Mary Lee Fitzgerald, the education director for the Wallace-Reader's Digest Funds. "It seems to me the only way you get institutions to change is to challenge them. I think there ought to be alternate vendors so the monopoly isn't there."

Sibyll Carnochan, the director of policy and research for the Broad Foundation, said the key issue isn't where school leaders are trained, but how. New training programs, she said, should blend coursework and on-the-job experience; provide ongoing support for novices; and combine a deep knowledge about instruction with management training. The Los Angeles-based philanthropy recently announced a \$100 million initiative to improve leadership, governance, and management in large urban districts.

"My own view is that we should try to play on both sides of the street," said Mr. McGuire of the Education Department. "On the one hand, we need to get on with this question of reconceiving what these university-based preparation programs would look like. Nor do I think we can afford to wait on these institutions to carry that out."

Is the Job Doable?

Still others wonder whether any preparation program could prepare people for jobs that have become so overwhelming in their demands.

Most superintendents and principals aren't paid commensurate with their responsibilities, Mr. Tucker of the National Center on Education and the Economy argued. They're under intense pressure to produce. Yet they have very little influence over the standards or assessments on which their schools are judged, Mr. Tucker said, and often have even less control over such key issues as personnel and budgeting.

"Who needs that job?" he asked.

Mr. Tucker believes that the principal's job description is in transition. "What we're talking about here," he said, "is not training principals for the job that exists—because I do think it's an impossible job—but training people who can actually change the job."

Michael D. Usdan, the president of the Washington-based Institute for Educational Leadership, suggests that schools might need two leaders: "Somebody to handle the external end of it, and somebody to handle the instructional end of it."

Many school administrators agree. Lynn Babcock, the principal of Grant Elementary School in the Detroit suburb of Livonia, Mich., noted that at her former job at a school in the western part of the state, she was the principal but had a colleague called an instructional leader. "And that was wonderful because then I was able to focus more on the managerial, everyday kinds of things that get in the way of being an instructional leader," Ms. Babcock said. "And she was able to work with the teachers on just that—on instruction."

Others have remarked that any school system has multiple leaders, including teacher leaders, union leaders, and school board members, whose roles also must be considered.

"The question is, what are the skills sets that we need, and where do they need to be situated?" said Warren Simmons, the executive director of the Providence-based Annenberg Institute for School Reform. "I think what we're coming to understand is that we need to build a critical mass of leaders in a community."

"It isn't as though the typical high school principal can stop fighting all those fires ... and spend the whole day out in the classroom," said S. Paul Reville, the executive director of the Pew Forum on Standards-Based Reform, based in Cambridge, Mass. "It's going to require new systems, and new approaches, and new organizations, and new ways of distributing the leadership function."

How policymakers—and the current generation of school leaders—can help bring that change about while keeping standards-

based reform on track is one of the most pressing issues in education.

"The success of the entire standards-based agenda depends upon having effective leadership at the school level," Mr. Tucker said, "and it doesn't appear to be there."

on the Web

From the Educational Resources Information Center (ERIC):

In "[Mistakes Educational Leaders Make](#)," the authors posit that administrator training programs need to focus as much on knowing what *not* to do as on what to do; and

["Leadership for School Culture,"](#) in which the authors argue that successful administrators view their organizations' environment holistically.

["Follow the Leader: School Principals in Training,"](#) from *Education World*, offers leadership stories from school administrators.

How do effective school leaders use power? ["The Problem With Power"](#) takes a shot at an answer. From the [American Association of School Administrators](#).

PHOTOS: The principal's job is not as attractive as it used to be, says David W. Bottom, the superintendent of a 1,100-student district in Illinois. "It's not fun to have your hands tied so much," he says. Dennis MagreeBarry Furze is superintendent of the 3,000-student Meade district in Sturgis, S.D.
--George Thompson

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January 12, 2000

Policy Focus Converges on Leadership

By Lynn Olson

Across the Nation

Related stories:

"Principals Wanted: Apply Just About Anywhere," also in This Week's News.

"Women Superintendents: Few and Far Between," Part One of our Leadership in Education series.

"Educational Free Agency," March 24, 1999.

"Principal Matters," Nov. 11, 1998.

After years of work on structural changes—standards and testing and ways of holding students and schools accountable—the education policy world has turned its attention to the people charged with making the system work.

LEADERSHIP

A Special Report

At the classroom level, that has meant a flurry of efforts to attract and train good teachers and keep them in their jobs. But nowhere is the focus on the human element in public education more prevalent than in the renewed recognition of the importance of strong and effective leadership.

Widespread agreement that U.S. schools face a dearth of administrators capable of providing that leadership has in recent months roused a broad and influential group of policy contingents to action. Among the players are the U.S. Department of Education, the Broad Foundation, the Ford Foundation, the Carnegie Corporation of New York, state governors and education officials, and the leaders of several national corporations.

The remarkable degree to which these and other groups are coming together to focus on a single issue is bringing with it millions of dollars in research grants and program funding, with a strong emphasis on reshaping the training and preparation of principals.

"Virtually everyone I talk to is focused on leadership at the school level in terms of the principal, and at the district level in terms of the superintendent and the school board," said Susan Traiman, the director of education initiatives at the Washington-based Business Roundtable. "Some are homing in on the crisis in leadership in urban school districts, but other groups feel that there's a nationwide crisis."

Yet despite the consensus that leadership counts, deep philosophical and political disagreements remain about what kinds of educational leaders are needed, where they should come from, and how they should be trained.

"There's just a whole lot of ground that needs to be plowed," said C. Kent McGuire, the Education Department's assistant secretary for educational research and improvement. "I don't think any of us feel that we've got our arms around this issue in a way where we're prepared to place really significant bets on any one thing."

Already, long-standing rivalries and political turf battles threaten to undermine attempts at broad, sustained improvement in the quality and quantity of school leaders.

Many policymakers, for example, criticize the preparation of school administrators in colleges and universities as outmoded and ineffective. But those institutions—which produce the overwhelming majority of principals and superintendents—have been left out of some of the recent discussions.

And the national organizations that represent school administrators fear they, too, may be bypassed. "Foundations are going to make a critical mistake if they don't deal with groups like ours," said Gerald N. Tirozzi, the executive director of the National Association of Secondary School Principals. "We're tired of sitting on the sidelines, and we're going to be players in this—serious players."

Large-Scale Efforts

The recent focus on leadership brings together philanthropies, government, and education policy organizations:

- The Washington-based Institute for Educational Leadership has received a total of \$1.2 million from the Ford Foundation and the Education Department to serve as a hub for burgeoning leadership efforts. In part, the IEL hopes to synthesize existing research on the subject and identify promising strategies.
- At the third National Education Summit in October, state governors and business leaders committed themselves to providing school leaders with competitive salaries and better professional development. The references to leadership were added to earlier drafts of the meeting's policy document after many participants raised it as a topic of concern.
- The National Center on Education and the Economy, also based in Washington, has received \$200,000 from the Carnegie Corporation of New York to devise the prototype for a national institution to train principals.
- The Broad Foundation has committed \$100 million to improve governance, management, and labor relations in large urban school systems. The foundation is particularly interested in recruiting, supporting, and training entrepreneurial leaders and innovators. So far, the Los Angeles-based philanthropy has offered challenge grants to the San Diego and Sacramento school systems to develop training programs for principals.
- Educational administration's three leading professional groups—the American Association of School Administrators, the National Association of Elementary School Principals, and the National Association of Secondary School Principals—have reached a preliminary agreement to create a national board for leadership certification, similar to the National Board for Professional Teaching Standards. The board would establish rigorous standards for exemplary work by school administrators and then oversee the process by which administrators would become board-certified.

The groups are also exploring the use of the Internet to provide online courses to principals and other administrators.

- The DeWitt Wallace-Reader's Digest Fund is about to launch a multiyear initiative on school leadership.
- The Annenberg Institute for School Reform, based in Providence, R.I., plans to announce a task force on the future of school districts this winter that likely will address leadership development as part of its agenda.
- The Panasonic Foundation, based in Secaucus, N.J., is working with seven school districts on a Leadership Associate's Program that introduces school and central-office administrators to ideas about organizational theory, strategic thinking, public engagement, and systems change. Middle-level officials are vital to the continuity in any district, said Sophie Sa, the executive director of the foundation. "Even with changes at the top, there's this cohort that's been working, and they'll stay," she explained. "They'll outlive three or four or five superintendents in their lifetimes, maybe more."
- Several universities—including such leading institutions as Harvard, the University of California system, and Teachers College, Columbia University—have begun leadership-training programs in the past year.
- School districts such as Houston, New York City's Community District 2, and Philadelphia have made recruitment and development of principals a top priority.
- More than half the states have adopted or adapted new standards for school administrators crafted by the Interstate School Leaders' Licensure Consortium, a collaboration of states and professional organizations. The standards are built around the premise that good leaders are those who can improve teaching and learning.

Why Now?

The sheer abundance of such activity reflects a widespread—and growing—recognition that without strong leaders at the helm, larger efforts to improve student achievement will likely falter, if not fail entirely.

"I've never been to a great school where they don't have a great principal," Gov. Thomas R. Carper of Delaware said at the education summit last fall. But, the Democrat added: "We haven't focused all that much in my state, and my guess is in most of the states around here, on principal leadership."

Certainly, the idea that strong leaders are important for good schools is hardly new. In the 1960s, the Harvard scholar Ron Edmonds noted that effective schools tended to have effective principals. And in the 1980s, Madeline Hunter traveled around the country urging principals to be strong "instructional leaders" who could coach their teachers on more effective practices.

But compared with other issues, leadership has largely been ignored in the most recent bout of educational improvement efforts. "To my

satisfaction it's never really been talked about," said the NASSP's Mr. Tirozzi, a former Connecticut education commissioner and assistant U.S. secretary of education. "While we seemed to involve every other group and organization, the principalship pretty much seemed to be left out of the discourse."

Those involved point to a host of factors that have raised leadership to the top of the policy agenda.

Most noticeably, the push for standards-based reform—and the pressure on schools to deliver in terms of academic performance—have raised the demands and pressures on principals and brought an unprecedented level of public scrutiny to their job performance. In some cases, principals' salaries and contracts are now dependent on gains in student achievement.

But the focus on leadership also reflects a belated recognition that standards and procedures alone can't energize a dispirited teaching staff or bring parents and community leaders together to turn around a failing school.

"People are saying, in order for a school to be effective, you need a principal who is strongly committed to and focused on teaching and learning," said Paul Reville, the executive director of the Pew Forum on Standards-Based Reform, based in Cambridge, Mass. "And we don't necessarily have people in those positions now who have that background or interest or expertise."

At the same time, the student population is becoming more diverse, increasing the demands placed on schools.

Nor have the management functions traditionally associated with school leadership gone away— if anything, they've become more demanding. Principals are expected to exert more control over budgets and hiring and to work more collaboratively with their communities.

The university-based programs that traditionally have prepared administrators have not responded adequately to such demands, many policy observers say. "There is widespread unhappiness and disillusionment with the lack of relevance of most administrator-training programs," said Michael D. Usdan, the president of the Institute for Educational Leadership.

Few districts have made it a priority to identify and groom potential leaders, despite a wave of pending retirements and chronic difficulties in finding candidates. In a 1998 survey, about half of 403 randomly selected districts reported a shortage of qualified candidates for vacant principals' positions.

That same year, the National Association of Elementary School Principals reported that the median age of K-8 principals was 50, and the average principal planned to retire at age 57. More than half of superintendents are also between 50 and 59 years old, with an average tenure of five years.

Indeed, one of the primary reasons for the heightened concern about leadership is that so few people appear ready—or willing—to take the

job, whether it's a big-city superintendency or the principalship of the local high school. "These positions are no longer highly desirable in a professional career," argued Mary Lee Fitzgerald, the education director for the DeWitt Wallace-Reader's Digest Fund.

'Casting a Wide Net'

But while most people agree on the broad outlines of the problem, the lack of consensus about solutions is reflected in the wide range of initiatives under way, as well as their exploratory nature.

"Are we talking about a single person or about a distributive model of leadership?" Mr. Reville of the Pew Forum asked. "How do we give teachers adequate guidance, direction, and support for the kinds of changes in instruction they'll need to be making and, at the same time, attend to the significant responsibilities of managing these complex school environments?"

The forum's efforts will seek to answer those and other questions, he said. "We're trying to convene people to begin to think through what does the new, realistic, instructionally focused model of leadership look like in schools," he explained.

Mr. Usdan described a similar role for the IEL's fledgling School Leadership for the 21st Century Initiative: "One of the issues that has to be addressed is, how does one define educational leadership? Is it just school leadership?"

Sibyll Carnochan, the director of policy and research for the Broad Foundation, said that originally her organization had planned to focus its \$100 million effort primarily on the problem of attracting, training, and keeping urban superintendents. But, eventually, it settled on a much wider agenda that also focuses on principals, school board members, district-level managers, and union leadership.

"The leadership issue is bigger than the superintendent," Ms. Carnochan said, "though clearly there's a lot of work to be done there as well."

Despite all the discussion, some remain skeptical that the focus on school leadership is serious.

"There's a lot of talk. I haven't seen a lot of money being put into this problem the way, certainly, it has into quality teaching," said Joseph Murphy, a professor of educational leadership and organization at Vanderbilt University.

"When people realized quality teaching was indispensable, resources began to flow," he argued. "I'm waiting for some energy and resources that would convince me the interest is reality, not just conversation."

on the Web

The [Institute for Educational Leadership](#) maintains a [directory of leadership development and training resources](#).

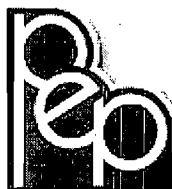
The National School Boards Association offers "[Leadership Qualities](#)" as one chapter in its [Education Leadership Tool Kit](#).

The [Education Leadership Institute](#), at Teachers College, offers its definition of [education leadership](#), including the resource "[The Hidden Crisis in Education Leadership](#)" (PDF file, requires Adobe's free [Acrobat Reader](#)) and links to related Web sites.

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The Principals' Executive Program (PEP), a constituent organization of the University of North Carolina's Center for School Leadership Development, conducts professional development programs for principals, assistant principals, and other leadership personnel in North Carolina's public schools. Established in 1984 by the North Carolina General Assembly, PEP seeks to improve the performance of the state's K-12 students by enlarging the knowledge and improving the skills of school administrators as managers and education leaders.

The need for continuous learning among school leaders has never been more important because the job of school leadership has never been more complex. It is not an oversimplification to say that a leader who stops learning stops leading. PEP's staff development activities therefore, are continually adjusted and refined to respond to the specific challenges of today's turbulent education environment.

Thank you for your interest in us. Please take a few moments to browse our site and learn more About PEP, its unique [Resources](#), and acclaimed [Programs](#).

Latest Happenings

HSPP Featured in *Edutopia*

The Fall, 1999 issue of *Edutopia*, the newsletter of The George Lucas Educational Foundation (yes, that George Lucas) featured a story on PEP's Higher School Performance Program (HSPP) entitled "Partnering For Success," by Roberta Furger.

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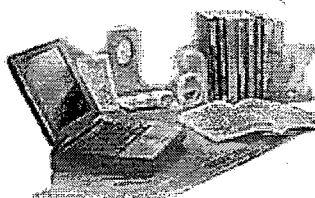
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PEP provides free telephone consultations on school law issues for all North Carolina public school administrators. For answers to questions concerning students (discipline, etc.) contact Janine Murphy. For answers to questions concerning school personnel issues (tenure, etc.) contact [David Hostetler](#).

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Research Initiatives

Principals' Salary Schedule Study

The Principals' Executive Program conducted a study to determine if inherent inequities exist between North Carolina's salary schedule for principals and assistant principals and the state's salary schedule for teachers. The study yielded five recommendations that were submitted to the State Board of Education. They are (1) that the administrative salary schedule be linked to the teacher's salary schedule with a 3 percent differential at all steps; (2) that the salary provision allowing a step increase for three years' experience as a principal be extended to all school-based administrators for all school-based administrative experience; (3) that the salary schedule accommodate differences on the basis of type of school (elementary, intermediate, secondary) as well as size of school; (4) that all schools with twenty or more teachers have at least one assistant principal; and, (5) that the supplement for holding a specialist degree or a doctorate be doubled. The recommendations have been accepted and will be considered in the State Board of Education's upcoming legislative requests.

School Improvement Project Study

For several years each participant in PEP's residential programs for principals and assistant principals developed, as a graduation requirement, a School Improvement Project (SIP)—a fully articulated, short- or long-term plan to effect a significant, specific change at his/her school. Recently PEP contacted graduates whose projects were deemed exemplary to determine how their projects were implemented and how effective they were.

Preliminary results of this survey indicate

1. that SIPs have the potential to improve student achievement;
2. that successful SIPs involved shared decision-making and resulted in change related to instructional practice;
3. that participation in SIPs positively impacts the professional efficacy and confidence level of administrators;
4. that SIPs can have a positive impact on school climate and safety; and
5. that technology has been useful in disseminating SIP information to a variety of groups.

For more information on this study contact [Anita Ware](#) at (919) 962-7165 or by email warea@email.unc.edu

Case Studies of "Turn-around" Schools

This year, PEP studied five North Carolina schools whose physical and demographic profiles were similar to those of traditionally low-performing schools but whose students achieved at a high level. The schools, which are located in low-wealth districts and serve high percentages of poor, minority students, are in Bladen, Burke, Jones, Montgomery, and Onslow counties. Data gathered from the study are currently being evaluated. PEP will publish the results of these studies in the coming year and will use them for instructional purposes in our programs and make them available to other agencies and interested parties across the state. Five more case studies will be undertaken this year.

Evaluation Studies

PEP is in the process of conducting two studies to develop and validate evaluation instruments for principals, assistant principals, and central office administrators. The studies' goals are to make the ways these educational leaders are evaluated (1) more performance oriented and (2) better related to the actual functions of their jobs. The instrumentation and accompanying procedures will be aligned with standards established by the NC Standards Board for Public School Administrators and with State Board of Education strategic priorities. Development of the instruments is currently underway; field-testing of the instruments is scheduled to begin in late autumn; validation and training will follow.

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Publications

Education Law in North Carolina Education Law in North Carolina (ELNC) is an annually updated, thirty-five chapter, "plain English" source of information about how federal and state laws affect North Carolina schools and administrators. ELNC is available in either a CD-ROM or two-volume, loose-leaf edition. The CD-ROM edition allows users to find information via electronic search and linking tools and contains primary legal sources including North Carolina education statutes, regulations, attorney general opinions, and selected caselaw. Almost every North Carolina school system subscribes to this resource, which has been published by PEP since 1987. **Cost: \$175.00 new, \$50.00 renewal.**

The Provident Principal This classic treatise is based on a series of lectures by John R. (Jack) McCall, a clinical psychologist, educator, and PEP program associate. Its title comes from the author's philosophy that every school needs a provident principal--that is, a principal who plans and thinks ahead to help every student or teacher in his or her school succeed and excel. **Cost: \$10.00**

Seminar Teaching: Five Case Studies This collection of cases was written by Alice H. Hart, PEP instructor and former North Carolina Principal of the Year. The cases report on the successful use of Paideia concept and seminar teaching in public schools. **Cost: \$15.00**

Leadership (Available in PDF format [here](#)) PEP's quarterly newsletter, Leadership, keeps the members of the extended PEP family informed of current events, upcoming programs and activities, and issues of general concern to school administrators. The newsletter highlights special projects, initiatives, and new developments in school law and education policy and features reviews of books of current interest and application. **Cost: Free to graduates, \$10.00/year to non-graduates.**

Contact [Kelly Pattison](#) with any questions regarding our publications, or [place an order today!](#)

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Library

PEP maintains a library of books, videotapes, and audio tapes on topics of interest to education leaders. **Graduates** of PEP's residential programs may borrow materials for one month. For questions about the library, contact [Lori Young](#) or [Download a PDF version of the catalog](#). [Order online](#).

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Links to Other Resources

- [PEP/MSA Connection](#)
- [Math/Science Education Network](#)
- [NC Center for the Advancement of Teaching](#)
- [NC Center for the Prevention of School Violence](#)
- [NC Principal Fellows Program](#)
- [NC School of Science and Math](#)
- [NC Teacher Academy](#)
- [Grants for Study in Japan](#)

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**Principals'
Executive
Program**

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PEP

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Program descriptions

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The Principals' Executive Program presents two types of programs: residential and topical. Residential programs, which take an in-depth approach to numerous topics, range from three to twenty days in length and require participants to (1) remain at a program site (in residence) for a specified number of days and/or (2) return to a program site for a number of sessions spanning a number of months. Topical programs are one- to three-day "stand alone" sessions devoted to specific topics. Because residential programs are state supported, all participants' expenses, including lodging, are borne by PEP except for the cost of a few meals and travel to and from the programs. Because topical programs are self-supporting, registration fees ranging from \$50 to \$200 per person are charged to offset costs. Participants in all PEP programs are eligible to receive documentation for continuing-education credits.

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Residential Programs Overview

Central Office Leadership Program (COLP) Program description	5 Sessions, 20 days total: Helps central office administrators address leadership issues and facilitates their ability to become lifelong learners. Audience: curriculum supervisors, personnel directors, finance officers and central office administrators
Developing Future Leaders (DFL) Program description	8 Sessions, 8 days total: Encourages teachers who have leadership qualities to pursue careers as school administrators. Audience: teachers
Higher School Performance Program (HSPP) Program description	5 Sessions, 15 days total. Helps elementary and middle school principals use data, align curriculum, and monitor instruction to increase student academic achievement. Audience: elementary school principals, middle school principals
Humanities Seminar Program description	6 days total. Offers veteran principals professional renewal via analysis of "big picture" issues (\$200 fee). Audience: career principals
Leadership Program for Assistant Principals (LPAP) Program description	4 Sessions, 16 days total. Helps assistant principals enhance existing managerial skills and develop individual leadership capacities. Audience: assistant principals
Leadership Program	5 Sessions, 3 to 15 days total. Helps administrators

Leadership Program for Career Principals (LPCP)	5 Sessions, 3 to 15 days total. Helps administrators with five or more years of professional experience address critical leadership issues.
Program description	Audience: career principals
Leadership Program for High School Principals (LPHSP)	4 Sessions, 10 days total. Helps high school principals use accountability formats, data, and resources to increase student academic achievement.
Program description	Audience: high school principals
Leadership Program for New Principals (LPNP)	6 Sessions, 15 days total. Helps new principals develop management skills necessary to become effective school leaders.
Program description	Audience: new principals
Principals as Technology Leaders (PATL)	4 Sessions, 10 days total. Helps school administrators improve teaching and learning through effective applications of educational technology.
Program description	Audience: principals, assistant principals, central office administrators and instructional staff

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Topical Programs Overview

Instructional Symposium Cost \$150 or \$135/team	2 1/2 days: Challenges school leadership teams to examine a specific instructional issue and develop an action plan for implementation at their schools.
Program description	Audience: school leadership teams, central office administrators
Law Symposium Cost \$100	1 1/2 days: Provides an annual review of school law issues with emphasis on current, "hot button" topics.
Program description	Audience: all school administrators, central office administrators
Law and Practice Update Cost \$75	1 day: Provides school administrators with information about recent changes in school law.
Program description	Audience: all school administrators, central office administrators
Orientation for New Principals & Assistant Principals Cost \$75	2 days: Furnishes novice administrators with up-to-date information about student accountability issues, legislative action affecting schools, and professional resources for school improvement.
Program description	Audience: principals and assistant principals in their first or second year
Technology Seminar 1 Cost \$200	2 days: Helps novice technology users learn the basics of Microsoft Word and PowerPoint and apply what they learn to administrative tasks.

Program description	Audience: all school administrators, central office administrators
Technology Seminar 2 Cost \$200	2 days: Helps school administrators learn the basic features of Microsoft Excel and advanced features of Microsoft Word and apply what they learn to administrative tasks.
Program description	Audience: all school administrators, central office administrators
Topical Seminars Cost \$75 to \$125	2 days: Provides in-depth study of of single topics of special interest to school leaders. See the <u>Topical Seminars</u> page for current offerings.
Program description	Audience: all school administrators, central office administrators

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Now Registering

Leadership Program for Assistant Principals (LPAP 31)

APPLY NOW

Session 1 August 15-18, 2000
Session 2 September 18-21, 2000
Session 3 October 24-27, 2000
Session 4 December 5-8, 2000

Leadership Program for Assistant Principals (LPAP 32)

APPLY NOW

Session 1 January 9-12, 2001
Session 2 February 20-23, 2001
Session 3 April 2-5, 2001
Session 4 May 15-18, 2001

Leadership Program for Assistant Principals (LPAP 33)

APPLY NOW

Session 1 January 30-Feb 2, 2001
Session 2 March 13-16, 2001
Session 3 April 24-27, 2001
Session 4 June 5-8, 2001

Leadership Program for Career Principals (LPCP)

APPLY NOW

Session 1 January 11-14, 2000
Session 2 February 15-18, 2000
Session 3 March 28-31, 2000
Session 4 April 11-13, 2000
Session 5 May 1-5, 2000

Instructional Symposium	January 24-26, 2000 <u>REGISTER NOW</u>
School Law Symposium	April 3-4, 2000 <u>REGISTER NOW</u>
Technology Seminar 2	February 23-24, 2000 <u>REGISTER NOW</u>

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[Contact the UNC Center for School Leadership Development](#)

Professional development and program innovation: School leadership initiative
(Proposed legislation)

FY 2001 Authorization (\$000s): To be determined

Budget authority (\$000s):

<u>2000</u> <u>Predicted Appropriation</u>	<u>2001</u> <u>Request</u>	<u>Change</u>
0	\$40,000	+\$40,000

PROGRAM DESCRIPTION

The School Leadership program would be a new initiative carried out under the authority of the proposed Elementary and Secondary Education Act of 1965 (ESEA) Title II (Teaching to High Standards) National Programs. It would provide superintendents, principals, and prospective principals -- particularly individuals who serve in high-poverty, low-performing districts and schools -- with professional development opportunities to improve their ability to function as leaders. The capacity of a school or district to improve teaching and learning is dependent to a great extent upon the quality of the leadership exercised by its principal or superintendent, but too often individuals who become educational leaders do not possess the skills or experience necessary to meet the challenge of creating an environment conducive to preparing all children to achieve to challenging standards.

Under the proposal, the Department would award grants to consortia that would include at least one local educational agency (LEA) and a State educational agency (SEA), institution of higher education (IHE), for-profit business, or other organizations with the expertise to provide professional development to school administrators. Each consortium would be required to include at least one LEA serving a concentration of children living in poverty and at least one organization that is not an LEA, SEA, or IHE. Grantees would use their funds to establish a leadership development center that would serve a State or region. Grantees serving regions would have to ensure that participants were provided training that is aligned with the State standards where they are employed. Each grant would be for a period of up to 5 years. The Federal share of funding would not exceed 50 percent of the cost of the project.

The types of professional development activities offered by each center would vary according to the needs of the areas served by each grant, but would be geared to helping sitting and prospective superintendent and principals meet the new demands of the job, in such areas as instructional leadership, budgeting, data-driven decision-making, site-based management, meeting the needs of a diverse student population, maintaining a safe and orderly school environment, and making effective use of technology in instruction and administration. Grantees would be encouraged to use effective leadership practices from fields other than education when developing their activities.

enhance
teacher
quality

Networking

FY 2001 BUDGET REQUEST

For fiscal year 2001, the Department is requesting \$40 million for the School Leadership Initiative. Program funds would assist consortia to provide current and prospective superintendents and principals, particularly individuals who serve in high-poverty, low-performing districts and schools, with sustained and intensive training to improve their capacity to serve as effective leaders and successfully implement standards-based reforms in their schools and classrooms. This program would be the first significant Federal investment in improving the skills of district- and school-level administrators.

Standards-based reform and school leaders

Standards-based reform has raised the demands and pressures on superintendents and principals to produce improved student achievement. Effective leadership can improve teaching and learning. Studies have found that effective superintendents: set goals and established expectations and standards; establish an instructional and curricular focus to ensure consistency in curriculum and instruction; and monitor curriculum and instruction. In addition, successful superintendents are able to improve morale districtwide by cutting through bureaucratic obstacles to secure quick solutions to pressing problems and promoting closer relationships between district and site administrators.

Research has shown that what principals do on a daily basis makes a difference in how much and how well students learn. Principals influence teaching and classroom practice through such activities as formulating school goals, setting and communicating high achievement expectations, organizing classrooms for instruction, allocating resources, supervising teachers' performance, monitoring student progress, and promoting a positive, orderly environment for learning. An effective principal can create an environment that focuses on and facilitates student learning and leads to increased student achievement.

Recruiting talented individuals

In recent years, local educational agencies have had increasing difficulty finding well-qualified candidates to fill superintendent and principal vacancies. A 1991 survey found that almost half of superintendents surveyed on been on the job for less than 5 years. Many districts are finding that the number of well-prepared candidates to fill superintendent positions is dwindling. A 1998 report by the Educational Research Service (ERS), *Is There A Shortage Of Qualified Candidates For Openings In The Principalship?*, found that half of districts surveyed reported a shortage of candidates at all levels -- elementary, middle, and high school. In addition, ERS found that only about one-fourth of surveyed districts reported the existence of an aspiring principals program to recruit and prepare candidates.

Once on the job, new principals find that their previous experiences have not prepared them adequately for the demands of the job. Principals are increasingly being held accountable for student achievement in their schools, but frequently lack training in such areas as: using achievement data to inform instruction and curriculum choices; determining the alignment of comprehensive school reform designs with State or local content and performance standards and assessment structures; and strategies for engaging parents and families in their child's

education. Few districts have formal programs for providing principals with such training. The ERS report found that fewer than half of the surveyed districts had a formal induction or mentoring program for new principals.

The amount requested would support approximately 20 centers that would provide professional development opportunities for approximately 10,000 current or prospective school administrators. Participants would be provided training in such areas as:

- Defining the mission of the district or school. An administrator who is an effective instructional leader clearly envisions the district or school's purpose and what it seeks to accomplish, and creates a climate of high expectations for all staff and students.
- Managing the instructional program. An effective principal needs to be able to work with teachers in the evaluation, development, and implementation of the school's curriculum and instructional programs.
- Promoting a positive climate. A principal or superintendent can create a positive climate by establishing clear, explicit standards that embody high expectations and creating a system of rewards that reinforces academic achievement.

In addition, centers could develop programs to recruit prospective principals and superintendents (particularly individuals who would serve in high-need schools and districts), including candidates with managerial and leadership experience in fields other than education, and to develop alternative pathways to administrative positions.

In 2001, the Department would reserve \$100,000 to conduct a peer review of applications. In addition, the Department would reserve \$200,000 to evaluate activities undertaken with program funds. **Do we want to reserve more? There is a distinct lack of data on what type of profession development for principals works.**

SELECTED PROGRAM PERFORMANCE INFORMATION

This section presents information on performance goals and objectives and selected performance indicators and strategies for measuring the progress made toward achieving program results. Desired interim and end targets will be identified for indicators when a baseline has been established. Achievement of targets is based on the cumulative effect of the resources provided in FY 2001 and future years, and the resources and efforts invested by those served by this and other programs supporting the performance goals and objectives.

Other performance indicators and strategies for this program are included in the Department's Annual Performance Plan.

Performance goal: To improve the quality of school building leadership, particularly in high-poverty, low-performing schools.

Objective: Provide principals with the skills necessary to create school environments conducive to preparing all students to achieve to challenging standards.

<u>Indicator</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>
The percentage of individuals who participate in high-quality professional development activities. <i>Baseline to be established.</i>				

Research has shown that principals can benefit from high-quality professional development. To be effective, the professional development must provide participants with opportunities to develop and practice new knowledge and skills. The training must be sustained and focus on specific outcomes, and provide participants with an opportunity for reflective practice and honest feedback. Program funds would allow districts to provide current and prospective principals with the type of research-based professional development that has been proven effective. Data for this indicator would be collected through an evaluation of the Department's professional development programs.

PROGRAM OUTPUT MEASURES (\$000s)

	<u>1999</u>	<u>2000</u>	<u>2001</u>
Number of centers	0	0	20
Estimated number of participants	0	0	10,000
Average award	0	0	\$1,985
Peer review of new award applications	0	0	\$100
Evaluation	0	0	\$200

PEP is riching program for principals

Principals centers are generally specifically IHE
affiliated + district-based models
Chicago

Very responsive to short term needs

— \$1.8 million

Crack 750,000 in receipts generation

SC gave \$1 million in start-up fund,
\$600,000 endowment from CP&L

Crack a start-up model for about
\$500,000 people

For augmenting existing centers

Tennessee, Ohio + SC have approached
PEP in NC.

Louisiana + Mississippi have inquired
Huron

Not enough similarity in regional
landscape — too generic.

Networking.

Requires that you start finding LCD —
only top 1 or 2 or 3 focal ~~the~~ priorities



"Dozier, Terry" <Terry_Dozier@ed.gov>
12/09/99 03:29:08 PM

Record Type: Record

To: Peter A. Weber/OMB/EOP
cc:
Subject: FW: Information for OMB

Peter-

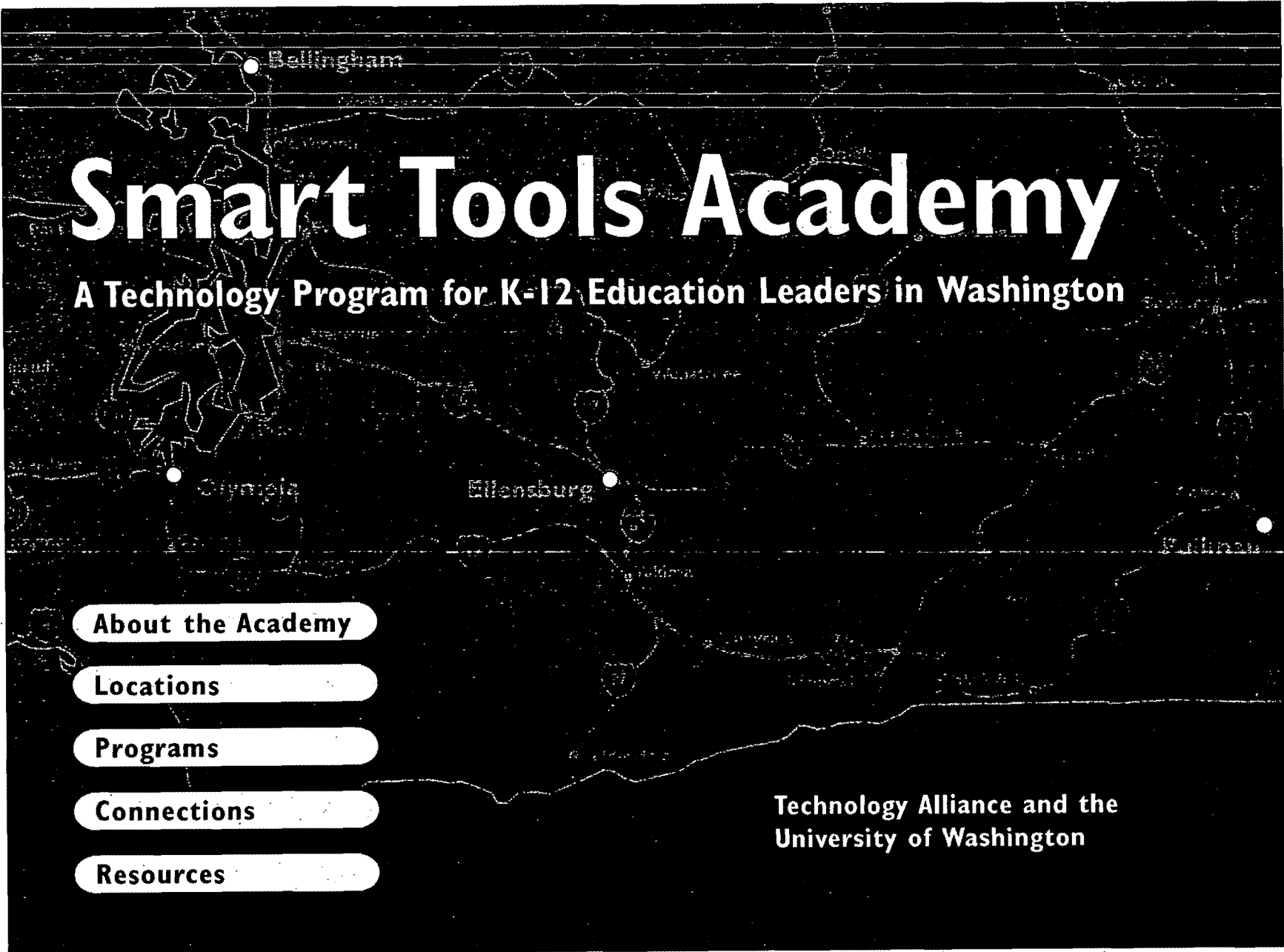
I enjoyed meeting with you yesterday. As promised, here are the skeletal ideas that Carole Kennedy, our Principal-in-Residence has been working on. I know she would be happy to meet with you to discuss any of these that sound intriguing to you and others at OMB.

Terry

> -----Original Message-----
> From: Kennedy, Carole
> Sent: Thursday, December 09, 1999 9:50 AM
> To: Dozier, Terry
> Subject: Information for OMB
>
> Here is a very rough draft of ideas---I'm sure I will be able to add
> more--
>
> Carole Kennedy, Principal in Residence
> 205-0687
> Room 7W226
>
>
>
>
>
> ROUGH DRAFT of ideas for principal leadership---
>
> Examples of steps that might be taken by the federal government in the
> areas of principal recruitment, preparation, induction and professional
> development. This is a brainstorming list---there is no priority
> intended-- Perhaps the place to start would be to
> establish what we know about each of these issues now-a white paper on
> each of the areas.
>
>
> 1. Establish study groups (we can give them a better name) in each of
> the Regions for the purpose of holding conversations among stakeholders.
> Structured process to guide discussion-discussions around principal
> shortage-the why and what to do about it. In time these groups could

- > include principals, teachers, state board of education members, state
- > legislators, university leaders, business partners, parents and anyone
- > else with a vested interest in ensuring quality candidates for
- > principalships. These conversations would result in concrete
- > recommendations for actions especially for policymakers, preparation
- > program developers, and local districts.
- >
- > 2. Establish programs to encourage good teachers to become
- > principals-scholarships, loan forgiveness, and funds for recruitment
- > especially for minority candidates who are underrepresented in existing
- > principal positions.
- >
- > 3. Provide funds to "seed" models of recruitment. There are some
- > examples of states
- > doing this now. Provide the vehicle to disseminate results of successful
- > recruitment models.
- >
- > 4. Provide funds for the identification/development/dissemination of
- > successful beginning principal mentoring programs. Difficult for on-line
- > principals to devote adequate time to mentor new principals---need for
- > stipends for release time, use of retired principals (I believe there's an
- > Indiana program using retired persons-know that Albuquerque has a small
- > program using retired principal as mentor.)
- >
- > 5. Support and encourage the creation of a commission analogous to the
- > National Commission of Teaching and America's Future that would build on
- > that commission's successes. This commission could suggest systemic
- > strategies
- > for improvement and identify good models of preparation/prof development.
- >
- > 6. Commission at federal level to address the barriers to entry to the
- > principalship-job responsibilities too great, *compensation not adequate
- > for responsibilities, time involved, stress of higher expectations for
- > student achievement, discipline, special education, threat of legal
- > action, etc. If not possible for ED to initiate such a commission then
- > could perhaps "support" the idea - and have foundation do it.
- > * When I became a principal in 1980 it took me eight years to make the
- > same salary (per diem) as the highest paid teacher in our school. We had
- > the exact degrees and years of teaching experience. The only difference
- > was she had been in the district more years than I. The salary
- > differentiation between teachers and assistant principals/principals is
- > not great enough.
- >
- > 7. Provide incentives for quality principals to STAY in the position
- > instead of accepting a buy-out from the district for early retirement.
- >
- > 8. Provide additional training and incentives for quality principals to
- > accept positions in challenging inner city schools/ rural school
- > districts.
- >
- > 9. Provide funds/vehicle for the establishment of networks of quality
- > principals---from the ranks of Blue Ribbon Schools, New American High
- > Schools, Professional Development Award winners, National Distinguished
- > Principals (NAESP), Principals of the Year (NASSP). These principals

- > would then serve as "authorities" on best practices-available to
- > principals of low-performing schools.
- >
- > 10. Use the bully pulpit to inform state legislators of the importance of
- > principals being instructional leaders. For too many of them, control,
- > management and fiscal responsibility are the important skills. Use
- > bully pulpit to beat the drum for the principalship.
- >
- > 11. Support and encourage the creation of a National Board of
- > Professional School
- > Leadership.
- >
- > 12. Support research and development that focuses on new approaches to
- > improving school leadership, including the exploration of alternative
- > forms of school leadership.
- >
- > 13. Enlist support of university/college presidents and deans of
- > education to structure
- > preparation programs that meet the needs of today's principals. Greater
- > emphasis on instruction, curriculum, technology, standards and
- > accountability, data analysis-- problems-based prep program led by
- > professors familiar with realities of today's schools
- > Encourage the revision of state standards for leadership
- > preparation
- > programs based on the new standards recommended by national
- > professional associations for administrators.
- >
- >
- >
- >
- >
- >
- > 14. Identify outstanding recruitment, preparation, induction and
- > professional
- > development programs existing now---recognize them and disseminate
- > information
- > about their programs.
- >
- > 15. Develop academies to identify and encourage young professionals with
- > leadership
- > potential and train them to model good practice.
- >
- >
- > Some of these were taken from recommendations of the Policy Brief
- > "Effective Leaders for Today's Schools" that resulted from the Policy
- > Forum on Educational Leadership held in DC in January of 1998.
- >
- >
- >
- >
- >
- >
- >

A stylized map of Washington state is the background of the entire page. Major cities are marked with white dots and labeled in a small, light font. These include Bellingham in the north, Olympia on the coast, Ellensburg in the central region, and Pullman on the eastern side. The map shows major highways and geographical features like the coast and mountain ranges.

Smart Tools Academy

A Technology Program for K-12 Education Leaders in Washington

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Technology Alliance and the
University of Washington

**Smart Tools Academy:
A Technology Program for K-12
Education Leaders in Washington**

Academy Mission

The mission of the Smart Tools Academy is to ensure that all Washington principals and superintendents, from public and private schools, share a vision and an understanding of the ways that technology can support and improve student learning and academic achievement. Knowledgeable and inspired school leaders will, in turn, teach and inspire others – their colleagues, teachers, staff, parents, and communities – and thereby ensure that all children in Washington will master the skills they need to thrive in a technology- and information-rich future.

Academy Focus: School Leaders

For students to thrive as citizens in the information-rich world of the next century, effective use and understanding of technology is not a luxury but a necessity. We believe that thoughtful and systemic integration of technology into learning environments begins with the leadership of schools and districts. A committed and passionate teacher may transform a single classroom; but school- and district-wide transformation requires principals and superintendents who know how to introduce, integrate, and support technology in their schools and districts. Such leaders must also be able to communicate the value of these tools to the many constituencies they serve: students, teachers, staff, parents, and communities. Principals and superintendents are the keys to determining whether technology will be successfully integrated into Washington's schools.

<http://www.washington.edu/oep/academy>

Smart Tools Academy Dates and Locations

Pilot

UW Olympic Natural Resources Center, Forks: May 21-23, 1999

Summer 1999

Western Washington University, Bellingham:	July 7-10, July 11-14, July 14-17
Washington State University, Pullman:	July 18-21 and July 21-24
Central Washington University, Ellensburg:	July 25-28 and July 28-31
The Evergreen State College, Olympia:	Aug. 1-4, Aug. 4-7, Aug. 8-11, Aug. 11-14

Academic Year 1999 - 2000*

Washington State University, Pullman:	November 4-7, 1999
Central Washington University, Ellensburg:	December 2-5, 1999
Central Washington University, Ellensburg:	January 20-23, 2000
Central Washington University, Ellensburg:	February 17-20, 2000
Washington State University, Vancouver:	March 16-19, 2000
Washington State University, Port Hadlock:	April 6-9, 2000
Western Washington University, Bellingham:	May 4-7, 2000
Western Washington University, Bellingham:	May 18-21, 2000
Western Washington University, Bellingham:	June 1-4, 2000

* All dates and locations are subject to change.

Summer 2000

Western Washington University, Bellingham:	July 6-9, July 9-12, July 12-15
Washington State University, Pullman:	July 16-19 and July 19-22
Central Washington University, Ellensburg:	July 23-26 and July 26-29
The Evergreen State College, Olympia:	July 30-Aug. 2, Aug. 2-5, Aug. 6-9, Aug. 9-12

Smart Tools Academy: Schedule Overview

Day 1

Schedule:

2:00-4:00	Registration and laptop distribution
2:00-4:00	Laptop and Windows orientation (drop-in, optional)
4:00-4:30	Welcome from Academy Director(s)
4:30-5:15	Vision video and facilitated discussion
5:15-5:30	Additional announcements
5:30-7:00	Dinner
7:00-8:00	Introduction to Milken Seven Dimensions
8:00-9:00	Web activity
9:00-10:00	Laptop and Windows orientation (drop-in, optional)

Details:

2:00-4:00pm: Registration and laptop distribution

Participants will have picture taken and review contact information in Academy database, entering any new data. This information will be compiled by staff into a web-based Academy yearbook that participants can access later that evening.

2:00-4:00pm: Laptop and Windows orientation (drop-in, optional)

Participants will receive instruction on how to use their laptop and the Windows operating system.

4:00-4:30pm: Welcome

Welcome conducted by one of the Smart Tools Academy Directors, Susannah Malarkey or Louis Fox. Academy instructors and staff will be introduced. Academy faculty will take over after introductions.

4:30-5:15pm: Vision video and facilitated discussion

▪ **4:30-4:45pm: Show video**

Participants will watch an Academy-produced video that shows the many different and inspiring ways that technology is used in schools and classrooms across the state.

▪ **4:45-5:00pm: Small group sharing**

After viewing the video, participants will break into groups to share a story about a technology success in their school or district as well as obstacles that have slowed the integration of technology.

Note: Participants will be pre-assigned to diverse groups of six (6) for the entire Academy.

▪ **5:00-5:15pm: Share examples with the entire group**

Participants come back together and volunteers share a few of the best stories and obstacles with entire group.

5:15-5:30pm: Additional announcements

Time for additional announcements and for participants to ask questions.

5:30-7:00pm: Dinner

7:00-8:00pm: Introduction to the Milken Seven Dimensions

▪ **7:00-7:15pm: Overview of the Academy and Milken Seven Dimensions**

Related to Academy mission and vision. Relate mission, vision, and 7 Dimensions as means to both achieve the successes shown in video and overcome obstacles to success.

- **7:15-7:45: Participants explore the Milken Seven Dimensions on the Web**
The goal is for participants to develop an understanding of each dimension. They will work in small groups to explore the dimensions and share their insights and observations
www.milkenexchange.org/policy/pi_7dimensions.html
- **7:45-8:00: Share observations of the Milken Seven Dimensions**
Large group discussion.

8:00-9:00pm: Web activity

- **8:00-8:45pm: Introduction to Web browsing**
Participants will learn navigation skills and view useful, innovative Web sites.
- **8:45-9:00pm: Participant yearbook**
Participants will view personal photo, respond to a question on student learning story, and review other participants' entries. The yearbook question is: *How can I improve student learning in my school(s) using educational technology?*

9:00-10:00pm: Laptop and Windows orientation (drop-in, optional)

Another opportunity for participants to receive instruction on how to use their laptop and the Windows operating system.

Required homework

- Milken publications
- Technology Alliance's "Preparing Washington Public School Students for the 21st Century: Four Case Studies of Successful Integration of Educational Technology"

Homework journal entry

What did you see or read today that makes you think technology can be used to impact student learning?

Day 2

Schedule:

7:00-8:00	Continental breakfast
8:00-8:15	Small group discussion
8:15-10:15	Focusing on the learning
10:15-10:30	Journal entry
10:30-11:00	Break
11:00-12:00	Technology access models and the learning environment
12:00-1:15	Lunch
1:15-3:00	Planning for professional development
3:00-3:15	Journal entry
3:15-3:30	Break
3:30-4:30	Exploring best practice activities and standards on the web
4:30-4:45	Journal entry
4:45-6:00	Break
6:00-7:30	Dinner
7:30-8:00	Introduction to presentation software and "Why Technology" project
8:00-10:00	Smart Tools workshops and open time

Details:

7:00-8:00am: Continental breakfast

8:00-8:15am: Small group discussion of Day 1 homework

8:15-10:15am: Focusing on the learning

- **8:15-8:30am: Overview**

Through a PowerPoint stand and deliver presentation, participants will be introduced to the key possibilities in using integrated technology to develop an awareness of the teacher's role in using technology in the classroom.

- **8:30-10:00am: Activities**

Participants will be taken through five or six different activities where they see examples of work that support the key possibilities. They will see complete examples of work as well as perform learning activities. Each activity will also highlight the different access ratios and management issues that teachers and school leaders would need to accommodate.

- **10:00-10:15am: Closure**

Reinforce how the technology enhanced student learning. Show models of how teachers use planning tools to focus on standards and the curriculum while integrating technology as a tool for achieving the goals.

10:15-10:30am: Journal entry

How do the learning activities I observed benefit student learning?

Why does computer technology seem to be the next tool to integrate into the classroom?

10:30-11:00am: Break

11:00-12:00pm: Technology access models and the learning environment

- **11:00-11:30pm: Technology access models and the learning environment**

Participants will learn various access models from stand and deliver presentations and brief video/PPT clips and then view informational Web sites.

- **11:30-12:00pm: Dimension 4: Learning Environments**

From PPT and stand and deliver presentations, participants will work through this Dimension. Instructors will facilitate a few minutes of discussion on technology access and learning context.

12:00-1:15pm: Lunch

1:15-3:00pm: Planning for professional development

1:15-2:00pm: Panel of teachers & librarian

A panel of teachers from the local area will respond to the following questions:

1. How has your classroom changed with the integration of technology? How has it changed the students?
2. What kind of preparation do you need to integrate technology? How did you learn?
3. What competencies does a teacher need?
4. What is the perception of parents and the community when technology is used for learning in the classroom?
5. What kind of leadership support do you need to successfully integrate technology into your classroom?

2:00-2:30pm: Working toward solutions: Professional development options in Washington State

A stand and deliver presentation of the TLT program and professional resources development rubric.

2:30-3:00pm: Share, summarize, and reflect

Participants should think about the general culture of professional development for their teachers, utilizing an "action steps" template which consists of the following questions: (1) What resources/programs do I currently have in my school(s). (2) What are the next steps to help my teachers integrate technology into their curriculum? (3) How will I inspire my teachers to higher levels of technology use?

3:00-3:15pm: Journal entry on professional development

What changes in the roles of teachers, students, and administrators are needed to support the integrated use of technology?

How must I change as a leader to support the integrated use of technology?

3:15-3:30pm: Break

3:30-4:30pm: Looking at best practices and exploring the EALRs on the Web

Introduce participants to Web based best practices activities and resources.

School district sites:

Bellingham www.bham.wednet.edu/curric.htm

Kent www.kent.wednet.edu

Peninsula www.peninsula.wednet.edu

www.copernicus-psd.com

Yakima www.ysd.wednet.edu/CI/CI.html

Using a technology integration assessment tool, participants will analyze and evaluate two outstanding electronic lessons.

Jeffery Miller--Grandview Middle School

Ocean Floors lesson

Kristi Rennebohm Franz--Sunnyside Elementary

Our Puerto Rico Comfort Quilt Story

If there is time, instructors will ask participants in each group to share their recommendations on the use of the Web sites they explored.

4:30-4:45pm: Journal entry

Can these best practices help students achieve higher standards? If so, why? If not, why not?

4:45-6:00pm: Break

6:00-7:30pm: Dinner

7:30- 9:00pm: Introduction to productivity tools, presentation software and "Why Technology" project

- **7:30-8:00pm:** Participants will be introduced to "smart tools" that can improve administrative efficiency and professional productivity. An emphasis will be placed on the power of presentation software as a communication tool. Participants will then be introduced to their task of creating a "Why Technology" presentation which will be shared with other participants on the final day of the session.
- **8:00-9:00pm:** Participants will be divided into 3 groups for hands-on instruction.

9:00-10:00pm: Smart Tools workshops

The following workshops will be available:

1. Newsletters with Word
2. Excel
3. Calendar programs and email
4. Advanced presentations
5. Multimedia

Required homework

- Read "What Should Superintendents Know & Do With Technology?" by Levinson and Surratt.
- Read "Educating the Net Generation" by Don Tapscott from Educational Leadership February 1999.
- Read "Call to Action: Getting Serious about Libraries & Information in Education" by Mike Eisenberg & Carrie Lowe.

Day 3

Schedule:

7:00-8:00	Continental breakfast
8:00-8:15	Small group discussion
8:15-10:00	Technology capacity
10:00-10:15	Journal entry
10:15-10:30	Break
10:30-12:00	System capacity
12:00-1:15	Lunch
1:15-2:30	System capacity (continued)
2:30-2:45	Journal entry
2:45-3:00	Break
3:00-3:45	Community connections
3:45-4:00	Journal entry
4:00-5:00	Break
5:00-7:00	Social and dinner
7:00-10:00	Smart Tools workshops

Details:

7:00-8:00am: Continental breakfast

8:00-8:15am: Small group discussion of Day 2 homework

8:15-10:00am: Technology capacity

- **8:15-8:30am: Video clips of classroom examples**

These video clips, drawn from Seattle Public Schools' New Tools tapes, will introduce the need for well-developed technology capacity, specifically the importance of connectivity

- Getting Wired – Mountlake Terrace students publishing student newspaper on-line
- Applying Technology to Applied Learning – Thorton Creek Watershed project
- Inside the Internet – A global art project between Pullman and Seattle Public Schools has 1st and 4th graders working together; art project integrates writing and social studies.
- Making History Come Alive -- Federal Way teacher Joe Gotchy's laptop classroom has a focus-on-technology based history project that utilizes web-based resources.

- **8:30-9:00am: Overview of Technology Capacity**

Through a stand and deliver/PPT presentation, participants will learn about the five components of technology capacity while reflecting on examples of these components drawn from Washington State (*will use data from the Technology Alliance's most recent survey*). This segment leaves participants with a basic understanding of different combinations of technology, networks, electronic resources, and support necessary to their school/district's learning goals. In looking at the Technology Capacity dimension, we are asking: Are there adequate technology, networks, electronic resources and support to meet the education system's learning goals?

- **9:00-9:30am: Working toward solutions**

Participants will work in their small groups to think about what action steps/solutions they can take with students, staff, and the larger community to create solutions for technology capacity in their school or district, utilizing an "action steps" template which consists of the following questions: (1) What is the current status of technology capacity in my school(s)? (2) What are the needs of my school(s)? (3) How can I meet these needs with existing resources? (4) What can I do about unmet needs?

Participants may also want to explore the technology capacity trends for their own and nearby districts using the *Technology Alliance: School District Technology Profiles*.

<http://depts.washington.edu/academy/techreport/>

- **9:30-10:00am: Sharing with larger group**
Participants will share thoughts and recommendations from their groups to the larger group. An emphasis will be placed on brainstorming local, regional, or state level solutions.

10:00-10:15am: Journal entry

What is my priority regarding technology capacity for my school(s)? Why?

How does technology capacity improve student learning, teacher productivity and administrative efficiencies?

10:15-10:30am: Break

10:30-12:00pm: System capacity

- **10:30-10:45am: Introduction and overview of system capacity**
This next presentation will shift our conversations and topics into leadership issues and building a capacity to lead. The first topic is system capacity.
- **10:30-11:00am: Small group discussion**
Participants will discuss the following questions:
 - What are the components that are necessary to build a common vision in your individual school or district?
 - What similarities do the members of the group share? What are the differences?
 - Draw on your previous successes with building a vision. How will you go about leading this effort?
- **11:00-11:45: Planning a campaign for technology**
This presentation will focus on the promotion of educational technology to constituencies within and outside of schools. Participants will view examples of communication tools from various districts. The facilitator will draw common themes and solutions from the large group, building upon the experiences of participants, while also evaluating the different communication tools and campaign strategies.

11:45-12:00pm: Journal entry

What communication strategies will I use in the future to help improve system capacity in my school(s)?

12:00-1:15pm: Lunch

1:15-2:30pm: System capacity (continued)

- **1:15-2:00pm: The balancing act of leadership and planning (ensuring capacity and systems thinking)**
Following a brief overview of the two main elements of systems capacity, participants will hear from two administrators on the difficulties of balancing leadership and planning.
- **2:00-2:30pm: Small group discussion of system capacity**
Participants will discuss leadership and planning in their small groups, and then report back to the larger group.

2:30-2:45pm: Journal entry

How will I strike a balance between leadership and planning during the next year?

2:45-3:00pm: Break

3:00-4:00pm: Connections

- **3:00-3:15pm: Closing the "digital divide"**
Stand and deliver/PPT presentation on programs developed to reach out to the community and help close the "digital divide." Special emphasis will be placed on library-based programs. Some programs include:

- Bellingham Schools' Seniors Outreach program
 - Powerful Schools in Seattle's Rainier Valley
 - Tech Access Foundation (Trish Milnes)
 - Shoreline's laptop checkout program and homework club
 - Onalaska Schools' Libraries
 - UW OEP/WTO Digital Divide project
- **3:15-3:30pm: Video**
Presentation of a short video connecting education with technology, business, and science to emphasize why students must have access to technology.
 - **3:30-3:45pm: Reflection and small group discussion**
Participants will reflect on what they have just learned and then consider potential approaches in their school(s), identifying stakeholders and engaging in mutually beneficial partnerships, exchanges, and collaborations.

3:45-4:00pm: Journal entry

What can my school(s) gain from community connections?

What opportunities exist in my community for beneficial partnerships?

How can I foster these partnerships with my community?

4:00-5:00: Break

5:00-7:00pm: Social and dinner

Reception followed by a regional dinner.

7:00-10:00pm: Smart Tools workshops

- **7:00-8:00pm: Smart Tools workshops**

Each workshop will run approximately 45 minutes on one of the following topics:

1. Newsletters with Word
2. Excel
3. Calendar programs and email
4. Presentations
5. Multimedia
6. Advanced presentations

- **8:00-10:00pm: Open time**

Participants can choose to attend a second workshop, work individually with their laptop, or retire for the evening.

Required homework

Participants will finish their "Why Technology" presentations which they will share with their small groups the following day.

Day 4

Schedule:

7:00-8:00	Continental breakfast
8:00-9:00	Sharing of "Why Technology" presentations
9:00-10:30	Accountability
10:30-10:45	Break
10:45-11:00	Directors' closing comments
11:00-11:30	Next steps discussion and Academy assessment
11:30-12:00	Program evaluation
12:00-1:00	Lunch

Details:

7:00-8:00am: Continental breakfast

8:00-9:00am: Sharing of "Why Technology" presentations

Participants will have an opportunity to share their "Why Technology" presentations with colleagues and receive feedback. Instructors will also ask for a few volunteers to share with the entire group.

9:00-10:15am: Accountability

▪ 9:00-9:30am: Accountability presentation

Stand and deliver presentation. Notes are being developed which will include school/district examples of using benchmarks, data collection, data-driven decision making, and on-going communication with stakeholders. May use case study from East Valley, West Valley, Central Valley and Freeman School Districts to evaluate six-trait writing; Peninsula School District and NW Regional Lab.

▪ 9:30-9:45am: Small group discussion

Participants will share their perspectives on accountability, focusing on measures they have implemented in their own school(s).

▪ 9:45-10:15: Sharing with larger group

10:15-10:30: Journal entry

What have I learned during the Academy that I want to share with others? Who will I share my experience with at my school or district?

10:30-10:45am: Break

10:45-11:00: Director's closing comments

Closing comments by an Academy Director summarizing and refocusing on the Academy's purpose.

11:00-11:30am: Next steps discussion

Where do we go from here? Staff will orient participants to post-Academy support options and activities, and then open the floor to general discussion about support options they would like to see and what participants can do to sustain and promote the vision.

11:30-12:00pm: Program evaluation and Q&A with Academy staff

Participants will complete a final yearbook entry, fill out web-based evaluation forms, and have an opportunity to ask questions.

- The yearbook question: *How will I integrate educational technology in my school(s) to improve student learning.*
- Evaluation questions: (1) *What have I learned at the Academy that will be most valuable when I return to my school(s)?* (2) *What is the most exciting or inspiring element of the Academy curriculum?* (3) *How can the Academy be improved?* (4) *What questions do I still have surrounding educational technology that could be met with Academy follow-up activities?*

12:00-1:00pm: Lunch

Smart Tools Academy Pilot Session: Participant Evaluation Comments

On program content:

"I am glad I'm here. I was skeptical at first."

"The Milken 7 Dimension is extremely helpful now and for future applications."

"Technology capacity and learning environment sections had very good information and could use more in-depth discussion—model classrooms, etc."

"The variety of teaching strategies and integrated curriculum examples were terrific."

"Would like to know more about creative ways to use technology with little money."

"If you have three live teachers, have them share a best practice as well as answer questions—it makes it much more real."

"Would like to see more innovative and affordable teacher training models."

"I enjoyed the PowerPoint demonstrations. This is something I have been wanting to do, and I think it got me over the initial fear of failure."

"Need to develop rubric for assessing value-added instruction to avoid 'layering' affect when introducing new technology into the schools."

"Overall, the opportunity to see quality lessons built around EALRs and develop our vision was wonderful."

On instructional methods:

"The availability of tutors/student staff was great."

"I enjoyed the quality of the instructors."

"I loved how the help desk sessions modeled an active classroom—noisy but productive. The help desks allowed for individuals to work at their own pace...and access helpers for specific questions. Also, just listening to the instruction in the background, I learned quite a few new little tricks."

"Active small and large group discussion is a worthwhile component of the Academy."

"Stop and have us share and reflect more—how would we use this in our school—after each segment."

"Short breaks every hour: 'The mind can only absorb what the seat can endure.'"

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