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The Portfolio Mindset: Innovation Starts from the Ground Up

In January 2012, 100 of the nation's pioneering district and charter leaders gathered in New Orleans for the 6th Portfolio School District Network meeting. The idea of the portfolio school district—one where a district aggressively closes unproductive schools, opens promising new schools by the best providers, and collects and publicly shares data on performance as part of a strategy of continuous improvement—used to be a novelty. At the first network meeting, in 2009, there were 15 people sitting around a boardroom table wondering whether this was anything more than an idea that could work only in the special circumstances of New York City or New Orleans. Three years later, 27 districts are implementing this continuous improvement strategy, with a dozen more wanting to learn how they can make it work for them.

The purpose of the portfolio network meeting has evolved over time. At first, districts needed to know how to get started—how to think through what an accountability system might look like or how to begin developing a talent strategy. We brought in experts like Rich Wenning from Colorado's Department of Education to talk about his new idea for visually mapping growth and achievement by school, which later went on to become Colorado's Growth Model and is now used by 15 states and dozens of independent districts. The network featured D.C.'s then Chief of Human Capital, Kaya Henderson, to talk about their guerilla strategy to turn around the image and reality of D.C.'s talent deficit. Her strategy soon turned D.C. into a mecca for the best teachers and principals in the country.

As more districts joined, network meetings took advantage of innovations going on in portfolio cities. Members learned about L.A.'s groundbreaking teacher effectiveness work and impressive parent engagement efforts. Members also visited Green Dot Public Schools to learn about how to borrow from Green Dot's "thin contract" when negotiating their own new collective bargaining agreements.

Now, six meetings later, districts are moving at a pace that is hard to keep up with. Top leaders from New York City have moved into superintendencies in Chicago, Baltimore, and Louisiana's Recovery School District (RSD), and are pursuing portfolio strategies in those cities. Several states, like Michigan, Tennessee, and New Jersey, are building statewide districts able to charter their failing schools, in imitation of Louisiana's RSD. Cities and states adopting the portfolio strategy are moving fast, looking for talent, solutions, and people to unite with in the work.

John White, the new state superintendent of Louisiana, launched the January 2012 meeting with the idea of a "portfolio mindset," one that believes that innovation comes from the ground up. And that is exactly how the New Orleans meeting was designed: it gave people who are implementing the portfolio strategy in different cities and states the chance to work on real problems together and to begin to jointly frame the work and progress. New to this meeting was the inclusion of charter school leaders who have signed District-Charter Collaboration Compacts, agreements with portfolio districts that prioritize student performance and address inequities in how schools share resources and responsibilities for students.

Over the course of two days, we coordinated 12 distinct consultancy sessions featuring the work and challenges of 20 portfolio districts. We based the sessions on issues that district and charter leaders had told us were pressing. We asked them to come ready to talk about a current problem on their plate for an intense consulting session. Topics ranged from whether to try to attract in-demand charter management organizations (CMOs) or spend resources trying to grow one's own; how to develop and implement a common enrollment system for charters and district-run schools; and what it looks like to give autonomy to all schools and why districts are concerned about doing that. The response to these sessions was tremendous; session leaders and attendees came away with new ideas and valuable supportive connections with others who are working on the same problems.

CRPE concluded the meeting by rolling out a powerful new tool—the Portfolio Implementation Snapshot—by which districts can gauge their progress on the seven components of a portfolio strategy. City snapshot mapping sessions and individual workshops on each element helped district leaders get a concrete view of what their work looks like today and where it could go next.

The 7 Components of a Portfolio Strategy

- Good options and choices for all families
- School autonomy
- Pupil-based funding for all schools
- Talent-seeking strategy
- Sources of support for schools
- Performance-based accountability
- Extensive public engagement

Read more about these key components [here](#).

Several major themes emerged from the meeting:

- Districts are in desperate need of more people to staff their leadership teams to get the work done. A small pool of highly sought after people currently do the work, and portfolio cities have resorted to poaching one another's staff.
- District and charter leaders agree that citywide strategic planning must be done with charters at the table. They are necessary partners in opening new schools and a crucial resource for teacher and leader talent and future central office staffing.
- District leaders from different cities need to meet more often. They need to know each other and know what they are working on,

and they need the support of other people doing a similarly challenging job. Charter leaders need those same connections.

- District and charter leaders from the same city benefited greatly from the opportunity to work, think, strategize, and socialize together. Though they live in the same city, they rarely have the time to do this.
- Finally, new kinds of districts are leading the work. Where New York City and New Orleans were the front guard, districts like Hartford, Baltimore, and Denver have joined them, even while they work with elected school boards and strong unions as part of their landscape.

Next steps:

In response to these emerging themes, we are planning a summer meeting to deal with the “bench building” issue facing districts. We will invite whole portfolio offices to come together to learn the basics of the portfolio strategy via case studies, research reports, opportunities to learn from experts, and workshops based on real problems brought by the districts. Attendees will be able to work as teams, but there will be time for superintendents, portfolio officers, and charter leaders to meet on their own as well.

We are continuing to expand the Portfolio Implementation Snapshot with an online tool that will show district progress and will include important policy and implementation documents from the most advanced districts, which can help other districts trying to get traction in those areas. Look for that to be launched in May 2012.

We are planning webinars on individual portfolio components, to give teams an understanding of the importance of each component, what it entails, examples of cities that are doing it well, and ways to gauge progress.

None of this work could have happened without the forward thinking and practical support of engaged funders: The Joyce Foundation, Carnegie Corporation of New York, the Michael & Susan Dell Foundation, and the Bill & Melinda Gates Foundation.

The portfolio idea has come a long way. Meeting in New Orleans was a great reminder of the incredible work of the leaders and educators there who have done so much to show what a new and dynamic model of public education might look like. Now, 27 districts are unleashing that portfolio mindset across the country, and more appear poised to follow suit.

Summaries that capture important takeaways from the New Orleans' meeting sessions can be found [here](#).